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Television 2000



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European Key Facts

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European Key Facts

7th Edition
September 2000

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Editorial

Television has returned to the centre stage of the public as well as of the advertising industry.

New formats have invigorated the medium and have drawn new audiences towards the flickering screens. Game-shows have returned to primetime, producing phenomenal results with “Who wants to be a Millionaire?”, thus providing additional promotion power to advertisers.

Reality television formats like “Big Brother” and “Survivor” lead the way and approach their audience more directly, straightforwardly, and promptly. Employing a fresh tonality and look, “boldly going, where no man has gone before”. Everyone expects this from their television, every day.

The Internet economy has brought television back into focus. While AOL boasts to have 22 million subscribers worldwide, this is not half the audience rating of CBS’s finale of “Survivor”. With a keen demand for airtime from the service industries and dotcoms alike, with fuelled creative efforts, television is tops again.

This medium has re-invented itself for more than 50 years now, and is still in full bloom globally. Television Key Facts provides you with a broad synopsis of the most important markets worldwide. We have analysed the creative harvest of more than 500 channels, described the relative positions of the respective competing channels on several continents. While Europe is still the focus of the Television yearbook, we have extended the scope towards the leading countries in advertising, the United States and Japan. We have added Brazil and Mexico, countries famous for their export of fiction fare. We have added Israel, it is culturally close to the Old Continent, and South Africa, the most important television market in Africa.

Television has changed the face of the 20th century, and it will be the lead medium for many – if not all – the decades of the 21st. Simply because of its ubiquity, its easiness of use, and its fascinating emotional power. It is the mass medium of choice, appealing to advertisers and the audience alike.

IP Group
September 2000

Acknowledgements

Television 2000 has been directed by **Thomas Sudholt**, the head of IP's International Marketing Committee (CMI) and of IP Germany's Research Department. Responsible for the collection of the data and the production of this report is **Thomas Kirsch** and his team of IP Germany. The report is funded by the IP sales houses and by CLT-UFA, with a contribution by ARBOmedia.net Group and its subsidiaries.

For this year's edition we would like to extend our first thanks to our new overseas contacts, for their help and engagement, which allows us to present an even more international overview of the worldwide TV landscape: Mexico: **Diana Arboleya Comas** and **Ruben Jara**, (IBOPE Mexico) and **Ingrid Schleicher**; Brazil: **Roberto Lobl** and **Luisa Fernanda Hinojosa Streber** (IBOPE Brazil); Israel: **Orna Gindy** (Tele-Gal) and **Amit Schejter** (University Tel Aviv), South Africa: **Alum Mpofu** (SABC TV). We are looking forward to working together again over the next few years.

Of course, we thank our other overseas contacts who helped us again, providing valuable information for this report which we could not have obtained alone: **Brian J. Lane** at Nielsen Media Research for USA, **Sachiko Nakano** at NHK's cultural institute and **Nicola Oberlinger** at Dentsu Europe for Japan.

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The purpose of this study is to provide a comprehensive overview of the television industry in Europe. The study is based on data collected from 34 European countries, including the United Kingdom, France, Germany, Italy, Spain, and the Netherlands. The study examines the market structure, the role of public service broadcasters, and the impact of digital technology on the industry. The study also compares the European market with other major television markets, including the United States, Japan, Brazil, Mexico, South Africa, and Israel. The study finds that the European market is characterized by a high degree of fragmentation, with a large number of small and medium-sized broadcasters. The role of public service broadcasters is significant, and digital technology is having a major impact on the industry. The study also finds that the European market is more competitive than the United States market, and that the European market is more innovative than the United States market.



European Television Overview

Key Tables

Country	Market Size (Billion Euros)	Number of Broadcasters	Public Service Broadcaster	Digital Penetration (%)
United Kingdom	12.5	15	BBC	85
France	11.2	18	France 24	78
Germany	10.8	12	ARD	82
Italy	9.5	20	Rai	75
Spain	8.7	16	RTVE	70
Netherlands	7.9	10	VRT	88
Sweden	6.5	8	Sveriges Radio	90
Denmark	5.8	7	Danmarks Radio	87
Finland	5.2	6	Yleisradio	86
Poland	4.5	9	Telewizja Polska	72
Czech Republic	4.1	8	Česká televize	70
Slovak Republic	3.8	7	RTVS	68
Hungary	3.5	6	Magyar Televízió	65
Slovenia	3.2	5	RTV Slovenija	62
Croatia	2.9	4	HRT	60
Serbia	2.6	3	RTS	58
Bosnia and Herzegovina	2.3	2	BHT	55
Montenegro	2.0	1	RTCG	52
Albania	1.7	1	RTK	50
Moldova	1.4	1	TRM	48
Ukraine	1.1	1	NTS	45
Belarus	0.8	1	RTB	42
Belgium	0.5	1	VRT	40
Austria	0.4	1	ORF	38
Switzerland	0.3	1	SRG SSR	35
Luxembourg	0.2	1	RTL	32
Ireland	0.1	1	RTE	30
Portugal	0.0	1	RTP	28
Greece	0.0	1	ERT	25
Turkey	0.0	1	TRT	22
Russia	0.0	1	ORTK	20

A Comparison of 34 European Countries, the United States, Japan, Brazil, Mexico, South Africa and Israel

In this year's edition, the main part of our report presents a detailed description of the different TV markets. In particular, it details the TV landscape with domestic and foreign channels, pay TV and digital TV as well as differentiated audience figures and advertising expenditures. The second part – Key Analyses – points out some future trends which have been taking place in the European television industry. Last but not least the Key tables give a global overview of television in Europe. With TV

equipment, cable and satellite, the audio-visual offer of TV channels, public and leading TV stations, the averaged viewing time, the pan-European channels and digital TV, as well as advertising figures, all details of television are considered from different points of view. But the reader should remember that all available statistics are of a very diverse quality and often difficult to compare and should bear in mind that the analysis section presents general trends rather than very specific figures.



Population and Audio-visual Equipment

COUNTRY	POPUL.	HOUSEH.	AV. SIZE	TV HOUSEHOLDS		COLOUR TV	MULTISET	VCR
	(in 000)	(in 000)	(Households)		(in 000)	(in % of TV Households)		
Austria	8 094	3 182	2.5	98.0%	3 036	98.2%	52.0%	71.5%
Belgium	10 214	4 538	2.3	94.8%	4 301	95.0%	23.7%	68.1%
Denmark	5 314	2 410	2.2	97.5%	2 350	99.8%	45.7%	77.4%
Finland	5 171	2 236	2.3	95.0%	2 124	94.7%	43.5%	75.7%
France	60 186	24 180	2.5	93.4%	22 580	99.2%	40.2%	63.8%
Germany	82 037	37 795	2.2	95.8%	33 560	99.9%	29.9%	70.6%
Greece	10 554	3 780	2.8	99.0%	3 738	98.6%	55.5%	55.3%
Iceland	279	98	2.8	96.0%	96	99.1%	48.0%	82.0%
Ireland	3 705	1 235	2.9	98.0%	1 215	99.0%	34.0%	76.0%
Italy	57 563	21 193	2.7	98.7%	20 911	99.3%	49.6%	61.7%
Luxembourg	433	160	2.7	99.0%	158	100.0%	51.0%	n.a.
Netherlands	15 760	6 740	2.3	98.4%	6 632	98.2%	41.7%	76.4%
Norway	4 445	2 000	2.2	91.0%	1 827	99.0%	35.0%	77.0%
Portugal	9 979	3 020	3.3	99.1%	2 991	91.7%	69.0%	62.6%
Spain	40 559	12 217	3.3	99.7%	12 181	99.2%	59.4%	68.2%
Sweden	8 861	4 095	2.2	98.4%	4 030	100.0%	57.0%	87.0%
Switzerland	7 124	3 161	2.3	92.0%	2 861	98.0%	31.0%	68.0%
United Kingdom	58 629	24 741	2.3	97.0%	23 988	99.0%	60.0%	84.0%
Total Western Europe	388 907	156 781	2.5	94.7%	148 579	98.9%	45.1%	71.3%**
Belarus	10 045	3 348	3.0	92.4%	3 093	78.0%	24.0%	12.0%
Bulgaria	8 340	2 920	2.9	94.3%	2 750	86.9%	12.5%	43.7%
Croatia	4 677	1 700	2.8	98.6%	1 677	97.4%	33.4%	66.2%
Czech Republic	10 321	3 822	2.7	98.9%	3 782	96.7%	24.9%	43.2%
Estonia	1 446	570	2.5	97.0%	540	96.6%	34.1%	35.3%
Hungary	10 044	3 869	2.6	95.5%	3 694	89.3%	20.4%	40.5%
Latvia	2 439	1 011	2.4	97.0%	981	84.0%	26.0%	35.0%
Lithuania	3 701	1 371	2.7	99.6%	1 365	87.9%	42.1%	26.7%
Macedonia	2 013	531	3.8	92.0%	488	77.0%	23.0%	46.0%
Poland	38 661	13 220	2.9	97.8%	12 933	94.9%	26.1%	49.0%
Romania	22 546	7 807	2.9	86.2%	6 737	72.1%	15.5%	14.2%
Russia	146 693	51 653	2.8	98.3%	50 775	90.4%	40.2%	41.8%
Slovakia	5 383	1 822	3.0	99.4%	1 811	94.3%	36.7%	32.3%
Slovenia	1 999	645	3.1	97.9%	634	98.1%	22.5%	58.7%
Turkey	63 000	15 000	4.2	90.0%	13 580	90.0%	14.0%	21.0%
Ukraine	50 245	18 609	2.7	83.0%	18 318	79.2%	27.8%	14.2%
Tot. Centr./East. Europe	381 553	127 898	3.0	96.3%	123 158	88.3%	30.3%	34.0%
Total Europe	770 460	284 679	2.7	95.5%	271 737	97.0%	39.5%	54.4%**
Brazil	170 100	43 660	3.9	90.5%	39 500	84.0%	n.a.	45.0%
Israel	6 041	1 650	3.6	93.2%	1 538	99.7%	44.6%	70.9%
Japan	126 480	43 900	2.9	99.0%	43 461*	99.0%	78.0%	92.0%
Mexico	98 795	21 047	4.7	96.0%	20 205	90.1%	52.6%	45.8%
South Afrika	40 584	9 059	4.5	64.1%	5 807	49.5%	11.6%	26.8%
United States	263 000	102 680	2.6	98.2%	100 800	99.0%	76.0%	85.0%

Sources: Local Institutes

* Data from 1995, **Only available figures

Population and Communication Technology

COUNTRY	POPUL.	HOUSEH.	PHONE	MOBILE	PC	INTERNET	
	(in 000)	(in 000)	% of HH	% of HH	% of HH	% of HH	user*
Austria	8 094	3 182	94.4%	60.5%	49.0%	16.0%	28.0%
Belgium	10 214	4 538	91.9%	10.5%	33.0%	13.7%	19.6%
Denmark	5 314	2 410	96.4%	54.5%	60.1%*	32.0%	42.3%
Finland	5 171	2 236	98.6%	71.7%	43.6%	25.9%	41.8%
France	60 186	24 180	98.0%	33.2%	22.2%	5.9%	12.0%
Germany	82 037	37 795	99.0%	25.0%	45.0%	18.0%	30.0%
Greece	10 554	3 780	63.0%	29.0%*	n.a.	1.5%	n.a.
Iceland	279	98	92%*	40%*	61.0%*	48.0%	68.9%
Ireland	3 705	1 235	81.0%	38.0%	20.0%	9.0%	13.5%
Italy	57 563	21 193	93.1%	58.1%	20.3%	6.7%	8.0%
Luxembourg	433	160	99.0%	41.0%	43.0%	17.0%	30.0%
Netherlands	15 760	6 740	98.1%	50%*	54.9%	23.5%	25.0%
Norway	4 445	2 000	95.0%	64.0%	67.0%	35.0%	36.0%
Portugal	9 979	3 020	83.5%	30.8%	33.4%	21.6%	13.0%
Spain	40 559	12 217	92.7%	27.3%	25.4%	6.3%	2.5%
Sweden	8 861	4 095	99.0%	51.1%*	51.0%	56.0%	55.4%
Switzerland	7 124	3 161	97.0%	22.0%	49.0%	26.3%	31.5%
United Kingdom	58 629	24 741	98.0%	41%*	34.0%	21.0%	30.0%
Total Western Europe	388 907	156 729	95.6%	37.3%	34.3%	15.8%	26.1%
Belarus	10 045	3 348	67.0%	n.a.	n.a.	n.a.	n.a.
Bulgaria	8 340	2 920	74.6%*	2.1%*	6.2%*	3.4%	4.5%
Croatia	4 677	1 700	94.5%	30.9%	24.5%	n.a.	2.1%
Czech Republic	10 321	3 822	76.6%	22.1%	16.5%	n.a.	10.3%
Estonia	1 446	570	78.0%	33.0%	17.0%	7.0%	21.0%
Hungary	10 044	3 869	74.0%	17%*	9.0%	n.a.	8.1%
Latvia	2 439	1 011	73.9%*	7%*	6.6%*	1.2%*	6.1%
Lithuania	3 701	1 371	71.6%	8.8%	6.3%	2.7%	n.a.
Macedonia	2 013	531	89.8%*	2.4%*	n.a.	0.6%*	0.8%
Poland	38 661	13 220	64.9%	11.6%	12.8%	3.0%	11.0%
Romania	22 546	7 807	45.0%	20.5%	n.a.	n.a.	5.8%
Russia	146 693	51 653	55.6%	1.1%	5.8%	1.0%	3.2%
Slovakia	5 383	1 822	71.3%	16.3%	14.0%	2.5%	10.5%
Slovenia	1 999	645	89.9%	35.7%	40.5%	12.6%	15.6%
Turkey	63 000	15 000	80.0%	13.0%	2.0%	1.0%	1.0%
Ukraine	50 245	18 609	61.9%	0.5%	3.2%	n.a.	2.5%
Tot. Centr./East. Europe	381 553	127 898	63.1%	6.8%	6.2%	1.1%	4.5%
Total Europe	770 460	284 679	81.0%	23.7%	21.7%	9.1%	14.9%
Brazil	170 100	43 660	49.0%	24.9%*	13.7%	4.5%	10.9%
Israel	6 041	1 650	97.7%	42.0%	41.4%	17.2%	10.9%
Japan	126 480	43 900	96.0%	n.a.	30.0%	11.0%	14.4%
Mexico	98 795	21 047	50.0%	8.7%	7.2%	5.8%	n.a.
South Afrika	40 584	9 059	28.8%	12.4%	9.1%	4.2%	4.4%
United States	263 000	102 680	94.8%	33.0%*	58.7%	45.0%	49.2%

Sources: Local Institutes

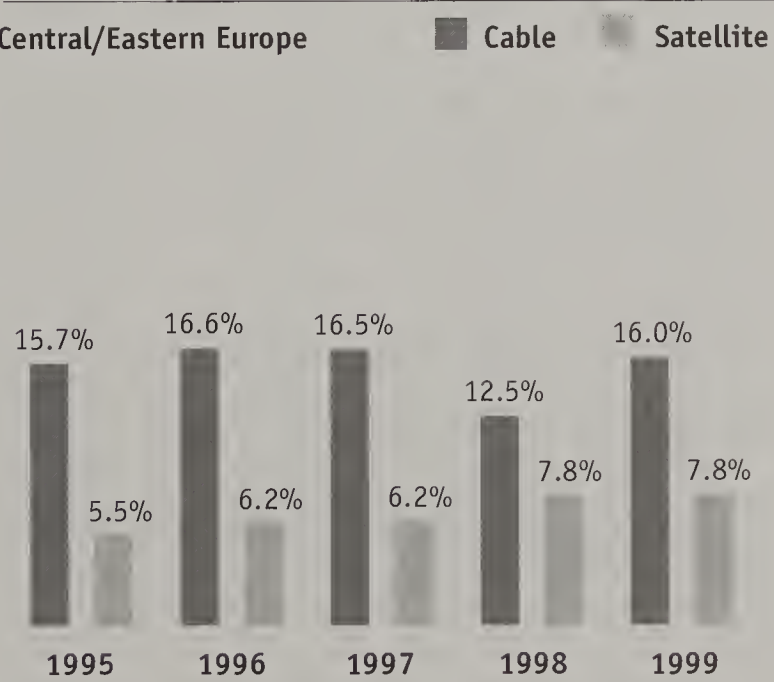
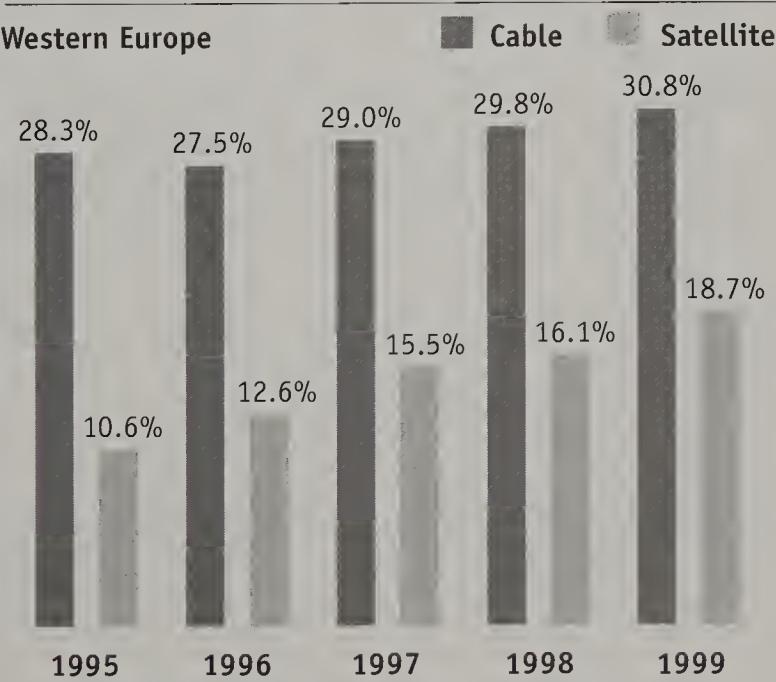
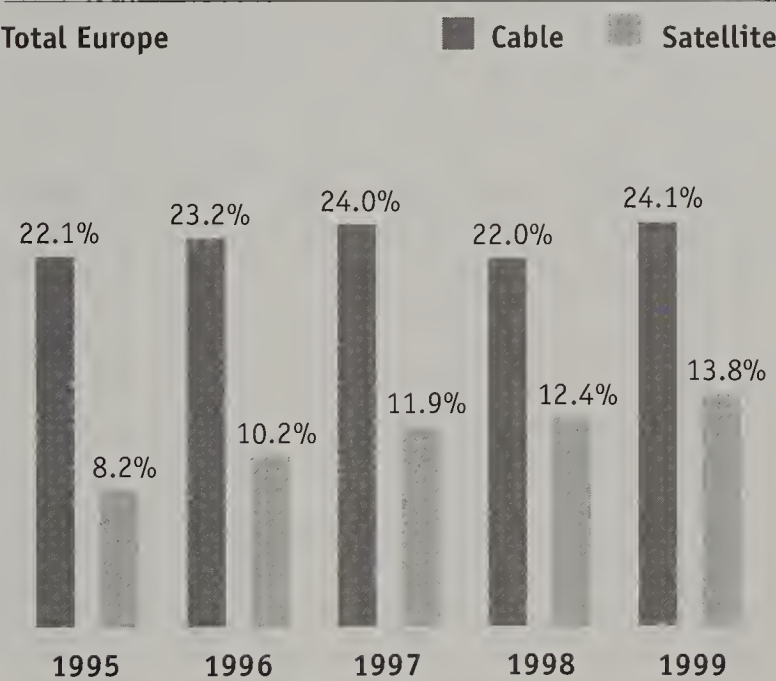
*of population

Cable and Satellite Give Choice to the People

Do you still remember the beginning of the Eighties? You came to school, university or work and all your friends or colleagues were discussing the latest trouble brewing around J.R. Ewing or Alexis Carrington. And at home there was no arguing about what to see in the evening. In those days, certain programmes like Dallas, Dynasty or Charlie's Angels kept the whole nation fixed to their television screens. The Eighties changed these habits radically – at least in some Western European countries – when the first private channels were introduced by cable and satellite diffusion of programmes. Nowadays, it is common to pick up the remote control and switch between a couple of different channels.

Nevertheless current reception systems in the various European states are still highly heterogeneous; it is possible to differ between four categories according to state of development.

- 1. Particularly smaller, landlocked countries invested heavily at the beginning of the 80's in cable distribution – nowadays with more than 80% of TV households connected to cable, this has become the main form of television reception. This is reality in Belgium, the Netherlands, Luxembourg and Switzerland. In the Benelux countries, satellite and terrestrial broadcasting are virtually non-existent.
- 2. In other countries cable and satellite reception are both important. This is the case for Germany, Austria, Denmark, Norway and Slovenia. In these countries, more than half of TV households are multichannel households.
- 3. In many countries, cable and satellite reception are still in the developmental stage. Less than 50% of TV households are multichannel and terrestrial reception is the only television reception system for most of the house-



Source: Television Key Facts 2000

holds. In this category we find the coastal Western European countries Spain, France, Portugal and the United Kingdom and in Eastern Europe: Belarus, Czech Republic, Turkey and Ukraine.

4. There are still some countries in which growth in cable or satellite reception remains insignificant and where terrestrial reception is the only main form of reception. This is the case for Greece and Italy.

As the airwaves of terrestrial TV stations do not tend to respect the small matter of borders between different countries, the only choice small and landlocked countries had when wanting a larger variety of channels was cable or satellite. Countries with less neighbours, or with a long coastline, therefore have less programmes available only via terrestrial broadcasting. Southern European homes or those of the UK rely far more heavily on terrestrial TV than Central European households.

In the meantime the development of the cable and satellite distribution from 1995 up till now has been less extreme, as the biggest changes already took place in the early 80's. The penetration rate for Germany, Switzerland and the Benelux has also nearly reached its limit. But, despite this, Western European countries still have a steady increase especially in satellite investments. Unlike the United States, where the direct reception market opened up with the country virtually entirely cabled,

satellite broadcasting made its appearance in Europe shortly after the development of cable. This makes satellite a head-on competitor to cable, seizing market share and influencing cable operators' network investment plans.

Unexpectedly, the Central and Eastern Europeans have experienced a lessening in their cable engagement and an increase in satellite dishes. The cost of sat receiver equipment has decreased gradually, and of course it is much less work to put a satellite dish on the roof of a house than to lay cable under the earth.

Cable and Satellite were the distribution platform for new forms of entertainment and a new type of channel which not only expanded the programme offer tremendously – much more important is, they gave choice to the people. But this choice is not the same reality in all countries. On the one hand there are a lot of countries where the majority of the population has the choice of about 30 channels – for example, Austria, Belgium, Germany, the Netherlands, Luxembourg and Switzerland. On the other hand, there are countries where most TV households have to be content with only three to five national channels. This is a reality in almost all Central and Eastern European countries, Mexico and Brazil, but also in quite a lot of West European countries, like Denmark, Finland, Iceland, Norway, Portugal, Spain, France, Italy and the United Kingdom.

COUNTRY	TV HOUSEH.	CAB. SUB.	SATELLITE	CAB. SUB.	SATELLITE	NO. OF CH.
	(in 000)	(in 000)	(in 000)		priv. & collective	by 70%
Austria	3 036	938	1 372	30.9%	45.2%	33
Belgium	4 301	4 068	133	94.6%	3.1%	28
Denmark	2 350	747	992	31.8%	42.2%	5
Finland	2 124	833	285	39.2%	13.4%	4
France	22 580	2 077	2 777	9.2%	12.3%*	7
Germany	33 560	18 122	12 753	54.0%	38.0%	36
Greece	3 738	n.a.	198	n.a.	5.3%	>10
Iceland	96	n.a.	3	n.a.	3.3%	3
Ireland	1 215	510	85	42.0%	7%*	n.a.
Italy	20 911	42	1 192	0.2%	5.7%	9
Luxembourg	158	130	24	82.0%	15.5%*	>40
Netherlands	6 632	6267	252	94.2%	3.8%*	39
Norway	1 827	713	493	39.0%	27.0%	4
Portugal	2 991	643	386	21.5%	12.9%	4
Spain	12 181	487	1 218	3.6%	10.0%	5
Sweden	4 030	1 733	1 008	43.0%	25.0%	n.a.
Switzerland	2 861	2 406	401	84.1%	14.0%	31
United Kingdom	23 988	6 021	4 270	25.1%	17.8%	5
Total Western Europe	148 579	45 737	27 842	30.8%	18.7%	n.a.
Belarus	3 093	371	155	12.0%	5%*	3
Bulgaria	2 750	1361	258	49.5%	9.4%*	2
Croatia	1 677	210	815	12.5%	48.6%	3
Czech Republic	3 782	836	545	22.1%	14.4%*	4
Estonia	5 204	2 092	567	40.2%	10.9%	4
Hungary	3 694	1829	399	49.5%	10.8%*	3
Latvia	981	402	59	41.0%	6%*	3
Lithuania	1 365	227	68	16.6%	5.0%	4
Macedonia	488	n.a.	41	n.a.	18.5%	7
Poland	12 933	4163	2160	32.2%	16.7%	3
Romania	6 737	3 456	222	51.3%	3.3%	1
Russia	50 775	n.a.	762	n.a.	1.5%*	7
Slovakia	1 811	453	871	25.0%	48.1%	3
Slovenia	634	314	272	42.9%	17.0%	5
Turkey	13 580	679	815	5.0%	6.0%	14
Ukraine	18 318	3 279	1 539	17.9%	8.4%	3
Tot. Centr./East. Europe	123 158	19 672	9 548	16.0%	7.8%	n.a.
Total Europe	271 737	65 409	37 390	24.1%	13.8%	n.a.
Brazil	38 000	2 546	1 520	6.7%	4.0%	3
Israel	1 538	1 161	110	75.5%	7.2%*	n.a.
Japan	43 461	4 346	12 169	10.0%	28%*	n.a.
Mexico	20 205	3 233	2 364	9.9%	11.7%	4
South Africa	5 807	888	215	15.5%	3.7%*	n.a.
United States	100 800	71 064	10 382	70.5%	10.3%	62***

Source: Local Institutes

* only Privat dish, ** only collective dish, *** average

The Audio-Visual Offer – or the Coming and Going of TV Channels in Europe

Times they are changing. In the Sixties and Seventies, the European TV market was clearly arranged and it was not too difficult a task to name and sum up all TV channels in Europe. Nowadays, as a result of the liberalisation of the airways from the late 1980's on, the number of TV stations has risen steadily through cable and satellite as well as digital packages and pay TV channels. Whereas the public channels till the Seventies had to provide programmes for everybody and the first private channels concentrated on programmes for a mass audience, in the Nineties we experienced a focusing on smaller segments of the audience of the new channels. The first wave gave birth to channels made for younger adults, main purchase responsables or children. In a second wave, niche channels were born, which – similar to special interest magazines – focused on a certain kind of content, such as music, sport, movies or news/documentaries. All these ongoing developments will further increase the diversity and wealth of the supply.

Nowadays, it is actually impossible to give an complete overview of all European channels. Even small countries like Macedonia dispose of more than 50 regional and local channels. And in bigger countries like Russia there exist almost 1000 regional and local channels. This year we will start to offer a list of the number of existing channels in the countries analysed. As we had to restrict the number of the channels, we chose technical penetration as our criteria and only put in national channels with at least 50% and regional channels with at least 5% penetration.

When comparing the launches of the TV stations in the different years from 1995 until last year, an interesting development could be noticed: in 1995, with the exception of one channel, all new launches were national or regional private TV stations. It only took one more year to form the first digital packages in Germany, Italy and Spain, while the United Kingdom offered their subscribers eight new pay TV channels. The year 1997, also saw a huge amount of new channels: 31 new private TV stations were trying to survive with money from advertising expenditures and another 12 Pay TV stations

were battling for subscribers. Some digital packages also merged but their time has not yet come. The beginning was in 1998: Denmark, Ireland, Italy, Japan, Poland and the United Kingdom launched all in all ten different digital packages. In 1999, Belgium, Sweden and Finland jumped on the digital train as well with 7 digital packages offered to the audience. In this year, a lot of thematic channels also came to life including: public as well as private news channels in Belgium, France, Germany, Sweden and Turkey; music channels in Switzerland, UK, Romania and Russia; cultural channels in Turkey and Mexico; Pay TV movie channels in UK, erotic channels in Portugal and Brazil and channels for children in UK and Israel.

And there is no end in sight. The future will be digital as there is the possibility to join the Internet to the television and the possibility to make television interactive.

This much glory must have a shadow side, and of course there is one. With the increasing differentiation of the TV market, some stations could not stand the competition. In 1995, six Channels in Estonia, Latvia, Slovakia and the Ukraine had to stop broadcasting. And in 1996, four TV stations in Denmark folded as well as in Norway and Iceland; sixteen different regional private channels in Latvia and in the Netherlands: Sport 7 only four months after its launch!

In Germany, two public TV stations emerged in 1997 which are concerned with special themes: the "Kinderkanal" especially for children and "Phoenix" for people interested in daily politics and historical documentation. After a couple of months, Viacom's German "Nickelodeon" had to stop their broadcasting because of too little income. At least this shows that the balance of the European way of licence-funded public channels and advertising-financed private stations is a fragile one, as long as the opportunities are not equal.

The next generation of stations is already on air in the denser television-markets. With more and more focussed channels coming via satellite or cable either digitally or analogue, there is still a large increase in channels in an already fragmented environment.

BIRTHS 1999/2000		
Country	Channel	Comments
Western Europe		
Belgium	LIBERTY TV. COM FR	National Private/Event
	LIBERTY TV. COM NL	National Private/Event
	KANAAL Z	News
	CANAL+ DIGITAL (NORTH)	Digital Package
	LE BOUQUET CANAL+ (SOUTH)	Digital Package
	CANAL+ SOUTH	Digital Package
	CANAL+ DIGITAL & LE BUUQET (SOUTH)	Digital Package
Finland	CANAL+ GOLD	Digital Package
	CANAL+ BLUE	Digital Package
France	AFB INFOS	National Private/ News
	MOTORS TV	National Private / Cars
	CINEINFO FR	National Private/ Movie Prom.
	MTV FRANCE	National Private / Music
Germany	N24	National Private/ News
Ireland	SKY DIGITAL	Digital Package
Netherlands	NET 5	National Private/ Generalist
	L1 (TV) LIMBURG	Regional Private/ News,Doc.,Sport
Portugal	PLAYBOY	Pay TV (Analog)/Erotic
Spain	TVA CANARIAS	Regional Public/ Generalist
Sweden	SVT 24	National Public/ News
	VIASAT	Digital Package
	CANAL+ BLA	Pay TV Analog/ Movies, Sport
Switzerland	SWIZZ	National Private/ Music
	TV 3	National Private/ Generalist
United Kingdom	SKY MOVIEMAX 2	Pay TV (Analog)/ Movie
	SKY MOVIEMAX 3	Pay TV (Analog)/ Movie
	SKY MOVIEMAX 4	Pay TV (Analog)/ Movie
	SKY MOVIEMAX 5	Pay TV (Analog)/ Movie
	DI. CIVILISATIONS	Pay TV (Analog)/ Docum.
	DI. SCI.-TREK	Pay TV (Analog)/ Docum.
	DI. TRAVEL & ADV.	Pay TV (Analog)/ Docum.
	M2	Pay TV (Analog)/ Music
	MTV BASE	Pay TV (Analog)/ Music
	MTV EXTRA	Pay TV (Analog)/ Music
	NAT. GEO.ADV. ONE	Pay TV (Analog)/ Docum.
	NICK JR.	Pay TV (Analog)/ Children
	RAPTURE	Pay TV (Analog)/ Teens
	SKY CINEMA 2	Pay TV (Analog)/ Movie
	SKY PREMIER 2	Pay TV (Analog)/ Movie
	SKY PREMIER 3	Pay TV (Analog)/ Movie
	SKY PREMIER 4	Pay TV (Analog)/ Movie
	SKY PR. WIDESC.R.	Pay TV (Analog)/ Movie
	SKY SPORTS. COM TV	Pay TV (Analog)/ Sport
	SKY SPORTS EXTRA	Pay TV (Analog)/ Sport
	UK PLAY	Pay TV (Analog)/ Music
	VH1 CLASSIC	Pay TV (Analog)/ Music

BIRTHS 1999/2000		
Country	Channel	Comments
Central/Eastern Europe		
Bulgaria	TV BULGARIA	National Public/Generalist
Croatia	HRT NATIONAL	National Public/Generalist
	KANAL RI RIJEKA	National Private/Generalist
	ALYTAUS REGIONINE TELEVIZIJA	Regional Private/Generalist
Lithuania	ATOMIC TV	National Private/Music
Romania	FOX KIDS	National Private/Cartoons
	MTV	National Private/Music
	MUZTV	National Private/Music
Slovakia	LUNA	National Private/Generalist
Turkey	DISCOVER	Natioanl Private/Cultural
	KANAL E	National Private/Generalist
	CNN TURK	National Private/News
	TELEON	Pay TV (Analog)/Sports
	ERA	National Private/Generalist
Ukraine		
Overseas		
Brazil	CINE SEX	Pay TV/Erotic
	STARCINE	Pay TV/Movie, Series
	TV CLIMA TEMPO	Pay TV/Meteorology
Israel	HOP!	National Private/Children
Mexico	CHANNEL 34	Regional Public/Cultural

Source: Local Institutes

Source: Local Institutes

European Public Channels – a very Important Piece of Television History

In contrast to the United States and countries like Brazil and Mexico, the history of Western European television was dominated by public channels during its first decades. In most European countries, TV began as a state owned or state controlled monopoly. In the United Kingdom, BBC1 was launched in 1936. Most of the public channels in Western Europe began broadcasting in the fifties (ARD/Germany; Nederland1/Netherlands; ORF/Austria; La Une/South Belgium; BRTN TV1/North Belgium; D1/Denmark; YLE-1 and YLE-2/Finland; RAI 1, 2, 3/Italy; RTP/Portugal; TVE 1/Spain, SVT 1/Sweden; SF1 DRS, TSR and TSI/Switzerland), some like ET 1 in Greece or TRT 1 in Turkey followed in the Sixties and Seventies. The commercial potential did not play a dominant role, television was, instead, considered as an instrument to provide people with culture and information and sometimes also to spread political and ideological ideas of the government.

The actual introduction of private television has been very different in each country and has developed in different ways at different speeds. In the early Eighties, there were only three private television channels in Western Europe (ITV, MTV and RTL). Liberalisation in the sphere of broadcasting, together with an increase in the number of frequencies available, mainly via the new satellite and cable transmission facilities within Europe, led to a major expansion of the private broadcasting sector in the following years. In 1994 though, private TV was still prohibited in countries like Austria, Denmark, Ireland and Switzerland.

What happened when private TV was introduced? Why did many viewers find that the public programmes were not satisfying their needs? What happened is that the private channels broadcast the kind of programmes that the viewing public wanted to see. The former Head of RTL, Helmut Thoma is quoted as saying “It is the fish who should like the worm, not the fisherman”. The variety provided by these new private television channels surprised public television broadcasters and led to a long, and still ongoing, competition. The average viewer does not make a firm distinction between private and public offer. They do not sit down in front of the television and purposely only watch the private channels or vice versa. The main difference to the average viewer is that one channel is paid for by licence fee, the viewer pays, and the other is paid for by advertising, the viewer does not pay.

The result of this competition, which has now lasted more than ten years, was heavy investment by the public channels into a more varied programming. It could be said that the private channels learnt from the public channels in that they saw what was previously missing and catered for this. Over the last decade, the shoe has

been on the other foot and the public channels have had to learn from the private broadcasters.

Another strategy of the public services in some countries was to launch new channels in the second half of the Nineties. They transferred niche themes for niche target groups to specialised stations, and in turn, brought formats to the main public channels which reach a wider audience in order to elevate ratings. In France, for example, there are special public channels for fiction (Festival), for documentaries (Histoire) and for classic music (Mezzo) and in Germany there are channels for children (Kinderkanal) and for documentaries (Phoenix).

The changes in the programming of the public channels and the launching of new niche channels in Western Europe were mainly financed by licence fees and enabled public broadcasters to keep the leading position in 9 of 18 countries. Most of the public channels in Western Europe could realize market shares between 30 and 40 percent. In Austria, Denmark and Ireland public channels still get higher audience rates than their private competitors, whereas in Greece, public television has a market share of less than 10 percent and is not very successful.

In Eastern Europe, public broadcasters keep the leading position in 6 of 16 countries. Here the panorama is more varied than in Western Europe. Whereas in Croatia, public channels still seem to exercise a monopoly with respect to audience, a lot of countries, e.g. Belarus, Estonia, Hungary, Latvia, Lithuania, Slovakia and Ukraine, public channels realize less than 20 percent of the audience market share.

In South Africa, public television still plays an important role with SABC 1 getting more than 50% of the audience. In contrast, in countries where public television was introduced after private television – such as USA, Brazil and Mexico – it has only marginal importance in terms of audience shares.

In some Western European countries, there is a trend which shows diminishing market shares of public channels, e.g. Austria, Finland, France, Norway, Portugal, United Kingdom, but the decline is quite slow. In other countries, there has been no clear trend over the last three years. In a few regions, public channels could even increase their market shares, in South Belgium and the Italian part of Switzerland, for example. In the near future, it seems that there will be no end to the battle of private and public broadcasters. This is perhaps no bad thing, as competition means for the viewers more variety and a better quality of programming.



AUDIENCE SHARES OF THE PUBLIC CHANNELS							
Country	Target Group	Channel	Audience shares			Revenue	Timeslot
			1999	1998	1997		
Austria	Adults 12+	ORF 1+2	58.1%	61.4%	61.5%	L-F, Adv.	all day
Belgium N	Adults 15+	TV1, KETNET-CANVAS	33.5%	33.5%	31.8%	L-F, Spon.	17-23 h
Belgium S	Adults 15+	LA UNE, LA DEUX	24.4%	23.8%	23.7%	L-F, Adv.	17-23 h
Denmark	Adults 12+	DR1+2, TV 2	66.9%	69.2%	68.5%	L-F, Adv.	all day
Finland	Adults 10+	YLE 1+2	43.0%	46.0%	47.0%	L-F	all day
France	Adults 15+	FRANCE 2+3. LA CINQUI.	43.6%	44.2%	45.3%	L-F, Adv.	all day
Germany	Adults 14+	ARD, ZDF, AND OTHERS*	43.4%	44.4%	42.5%	L-F, Adv.	all day
Greece	Individuals 6+	ET 1, NET	9.5%	10.0%	8.2%	L-F, Adv.	all day
Iceland	Adults 12-80	RUV TV	n.a.	46.0%	50.0%	L-F, Adv.	9-3 h
Ireland	Adults 15+	RTE 1. NET 2. TG4	50.0%	53.0%	53.0%	L-F, Adv.	all day
Italy	Adults 15+	RAI 1+2+3	48.1%	48.8%	48.9%	L-F, Adv.	all day
Luxembourg	Adults 12+	RTL TELE LETZEBUERG**	19.7%	21.3%	20.6%	Adv.	19-23 h
Netherlands	Adults 13+	NED 1+2+3	35.4%	37.3%	36.0%	L-F, Adv.	all day
Norway	Adults 12+	NRK 1+2	39.7%	41.0%	43.2%	L-F, Spon.	all day
Portugal	Adults 15+	RTP 1+2	35.9%	38.6%	39.7%	Gvt, Adv.	all day
Spain	Adults 16+	TVE 1, LA 2	33.6%	35.0%	34.4%	L-F, Adv.	all day
Sweden	Adults 15+	SVT 1+2	47.1%	48.8%	48.6%	L-F, Spon.	all day
Switzerland FR	Adults 15-74	TSR 1+2	32.8%	34.3%	33.0%	L-F, Adv.	all day
Switzerland GER	Adults 15-74	SF 1+2 DRS	32.9%	33.4%	31.9%	L-F, Adv.	all day
Switzerland IT	Adults 15-74	TSI 1+2	31.6%	30.3%	30.0%	L-F, Adv.	all day
United Kingdom	Adults 16+	BBC 1+2	39.6%	41.1%	42.8%	L-F	all day
Total Western Europe			38.4%	40.1%	40.0%		
Belarus	Adults 12+	BTV	12.2%	9.9%	13.0%	L-F, Adv.	all day
Bulgaria	Adults 14+	KANAL 1, EFIR 2	62.9%	58.8%	75.1%	L-F, Adv.	all day
Croatia	Adults 10-74	HTV (1, 2, 3)	94.5%	94.3%	n.a.	L-F, Adv.	7-1:30 h
Czech Republic	Adults 15+	CT 1+2	32.2%	33.8%	34.3%	L-F, Adv.	all day
Estonia	Adults 18-74	ETV	18.2%	20.2%	24.4%	Gvt, Spon.	all day
Hungary	Adults 18+	MTV 1+2, DUNA TV	18.5%	29.5%	62.8%	L-F, Adv.	all day
Latvia	Adults 12-74	LTV 1+2	19.0%	25.0%	26.0%	L-F, Adv.	all day
Lithuania	Adults 12+	LTV	10.0%	16.2%	18.0%	L-F, Adv.	6-1:30 h
Macedonia	Adults 14+	MTV 1+2	39.9%	37.1%	n.a.	L-F, Adv.	all day
Poland	Adults 16+	TVP 1+2	47.1%	50.0%	52.4%	L-F, Adv.	all day
Romania	Adults 15+	ROMANIA1, TVR2	39.7%	47.5%	42.9%	L-F, Adv.	all day
Russia	Adults 18+	ORT, RTR, KULTURA, TV CENT.	50.0%	60.4%	66.0%	L-F, Adv.	6-1 h
Slovakia	Adults 14+	STV 1+2	15.0%	22.2%	22.0%	L-F, Adv.	all day
Slovenia	Adults 18-75***	SLO 1+2	32.8%	35.8%	n.a.	L-F, Adv.	all day
Turkey	Adults 20+	TRT 1+2+3+4	n.a.	n.a.	n.a.	L-F, Adv.	all day
Ukraine	Adults 15+	UT 1+2	7.8%	9.1%	n.a.	L-F, Adv.	all day
Tot. Centr./East. Europe			32.9%	36.8%	39.7%		
Total Europe			36.1%	38.6%	39.9%		
Brazil	Individuals 2+	TV EDUCATIVA	<3.0%	<3.0%	<3.0%	Gvt	6-24 h
Israel	Individuals 4+	IBA 1,2 IETV	41.0%	58.6%	n.a.	Gvt, Spon.	n.a.
Japan	Individuals 7+	NHK****	24.0%	26.0%	26.0%	L-F	5-24 h
Mexico	Adults 13+	CHANNEL 11, 22	<3.0%	<3.0%	<3.0%	n.a.	all day
South Afrika	Adults 15+	SABC 1,2,3; BOP	85.8%	n.a.	n.a.	Adv., Sub	all day
USA	Individuals 2+	PBS	<3.0%	<3.0%	<3.0%	Fund., States	all day

Source: Local Institutes, unweighted averages;
* 3SAT, Arte, Kinderkanal, Pheonix, ARD III, BR ALPHA, ** Privat with Public service function, ***1998 18-75, **** NHK General TV, Educational TV, BS2

The Yearly Battle for Market Leadership of the TV Channels

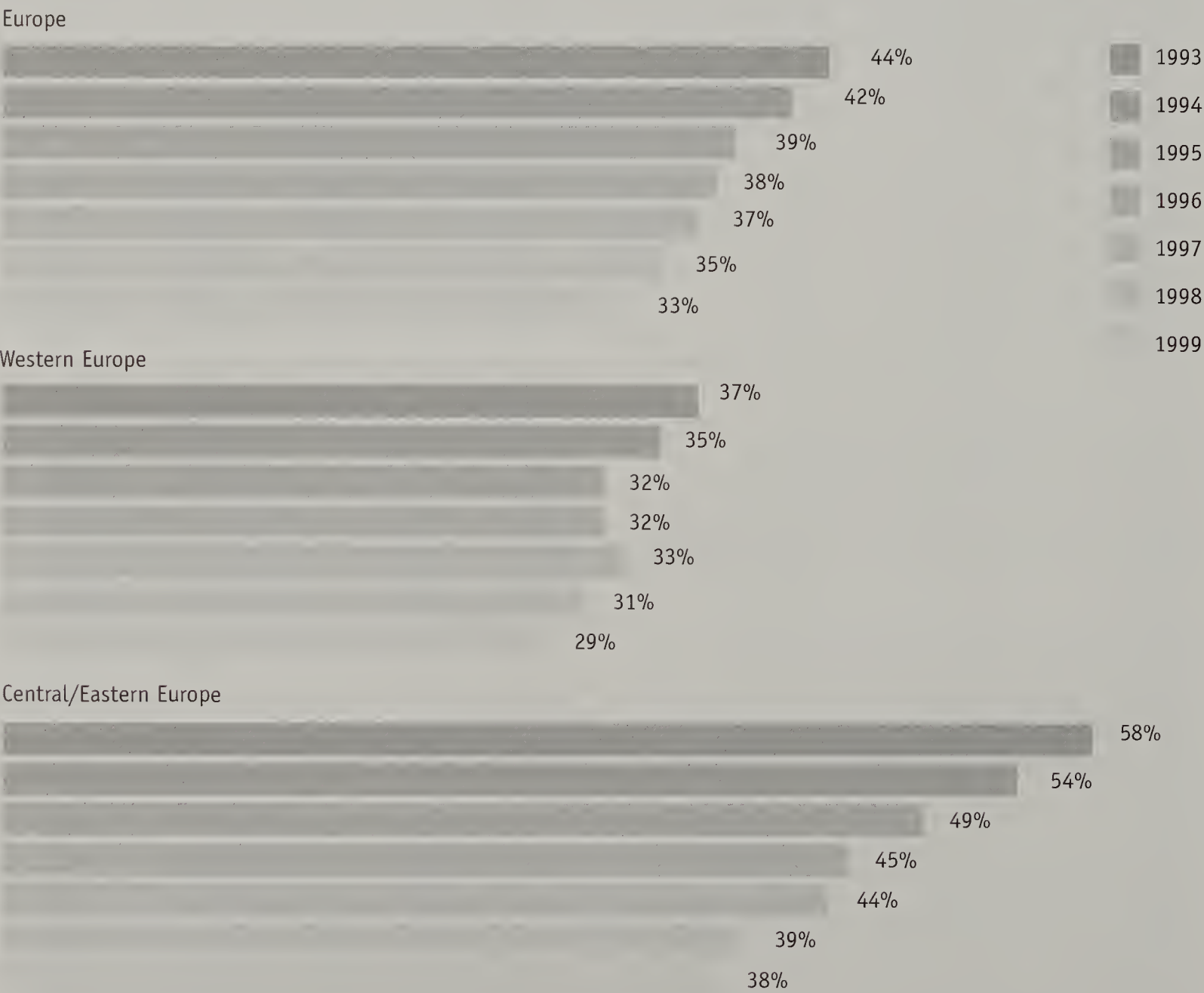
In Europe, the Nineties were characterized by the fragmentation of television markets due to the liberalization processes some years before and the development of the new distribution technologies cable and satellite. Old monopolies of mainly public service channels had to face new competitors and say farewell to audience shares of 50 percent and more. The fragmentation of the TV market in Europe caused a more and more fragmented audience. It is common that the more television channels an average household can receive, the smaller the expected market share for competing channels will be. Markets with low fragmentation are dominated by channels with a large market share.

Looking at the adult audience as a whole, channels with large market share are most likely to be found in the countries of Eastern Europe. Here in five countries, Czech Republic, Bulgaria, Croatia, Belarus and Slovakia, people spent more than 50% of their viewing time with the leading channel. The same phenomenon also occurs

in Brazil and South Africa. In Brazil, TV Globo is traditionally the leading channel since the mid Seventies, not threatened by any of its competitors, but with decreasing audience shares since the beginning of Pay TV.

Generally speaking, in the mature markets of Western Europe, the audience share of the leading channel is lower. In countries like Germany, the Netherlands, South Belgium and Luxembourg where the majority of the population can choose among 30 channels and more, the market share of the leading channel is less than 25%, which is quite low. In countries with a limited choice of channels, higher audience share can be realised. The leading channels in France, Finland, Denmark, Portugal and Ireland can achieve more than 35%.

In countries with many domestic TV stations, the yearly battle for market leadership is quite intense, but in 1999, the leading channel changed in only three of the countries studied. In Turkey, there are three channels competing for leadership, and this year, channels Show



TV and Kanal D managed to remove channel ATV from market leadership. In Germany, RTL regained the leadership it had lost in 1998 and ARD had to be content with second place. And in Sweden private TV 4 overtook the first position from public SVT 2. Italy attracts attention as RAI 1 is a constant market leader although it also stands in contest with eleven different TV stations.

A number of other countries do not fear the end of the year when the certification of good work is awarded and public (like ORF 2 in Austria) and private channels (like ITV in the United Kingdom) are represented in the same way. The competition in those countries is quite low and they only fear comparison of the share of the year before. But that some changes are even possible in those little fragmented countries shows the development of television in central- and eastern Europe: NOVA was one of the first private channels that replaced the public channel CT1 in the Czech Republic. Since then it has held a constant leading position in the market. Latvia, Slovakia with the highest share of 62.4 % for TV MARKIZA, Slovenia, Ukraine, Hungary and Lithuania followed with a private offer and achieved the first place on the list. Summing up, in central and eastern Europe only seven out of sixteen countries analysed recorded a public channel as the market leader. Globally, the trend towards fragmentation in eastern European countries will increase due to the success of the private channels with the planned arrival of new players. This is also shown by the heavy decreasing of average audience market shares over the last years. Compared to western Europe the decline is very strong.

It is also remarkable that in Western Europe the public channels still play an important, but decreasing role in the market with 8 leading channels (last year: 10) in 18 countries. Austria and Denmark, in fact, prohibited the introduction of private television until 1994. Nevertheless, the private channel TV 2 has already been market leader in Denmark for some years; and after the law in Finland changed, the Finish private channel MTV 3 won the top market position immediately and still has it.

All in all, as already in 1998 there were not many changes of leading channels in 1999 compared to 1997.

The fragmentation of the audience market is also obvious, when we have a look at the list of top programmes and search for channels, where one TV channel alone takes the 20 top programmes in the year's rating chart. These are becoming rare. In Western Europe, these are the French channel TF1, the Portuguese channel SIC and the Irish channel RTE 1, in Eastern Europe there

is only Romania, where the top 20 programmes are broadcast by one channel, TV Romania 1. And in Brazil, TV Globo is responsible for the 20 most successful programmes.

It is also interesting to look at audience leadership for special target groups. If we have a look at the target group of young adults – the most interesting for the advertising industry – we see that in some countries it is not the same channel which gets the highest audience for all adults and for the young adults. Not surprising that sometimes the private channels that depend more on advertising revenue make the race in this target group. In Italy, private Canal 5 removes RAI 1 from the first place. In Spain, it is private Antena 3 which replaces public TVE, in Norway the private channel TV 2 is ahead of public NRK 1, in Poland the same happened with Polsat and TVP 1. And in Estonia, private TV 3 makes the race in target group of the teens before public ETV, which is leader for all adults (18–74).

Different leaders for the two target groups can also be found in a number of other countries: In Austria, public channel ORF 1 is the leader for young adults, whereas public channel ORF 2 got the pole position for all adults. In Greece, it is private MEGA TV which attracts the highest audience for young adults, whereas private Ant 1 is the leader for all individuals, and in Hungary, private RTL Klub is the leading channel for young adults, whereas private TV 2 is the most watched channel for all adults. In the United States too, different networks succeed with different target groups: whereas the networks ABC and CBS with 13% each got the highest share for all adults, it is NBC, which shares leadership with ABC for the young adults.

Children are a special target group. Many broadcasting enterprises take into consideration that conquering the attraction of the youngest generation today can mean loyal adult spectators in the future. We can observe two strategies: either special time slots are made attractive for children or – in the case of big TV groups – special channels are launched to specialise on the very young. This is the case for Germany, where you can find private Super RTL – member of the RTL group, in Northern Belgium with public Ketnet and in Mexico with private Channel 5 – part of the Televisa enterprise – as market leader for children.

There are different leaders for adults and children in many other countries as well: in the USA we find WB, in South Belgium Club RTL, in Denmark DR 1, in Norway NRK 1 in Spain Antena 3 in Sweden SVT 1, in Estonia Kanal 2 and in Ukraine Studio 1+1 as the most watched channels by children, but not by adults.

AUDIENCE SHARE OF THE LEADING CHANNEL						
Country	Target Group	Channel	Share '99	Channel	Share '98	Timeslot
Austria	Adults 12+	ORF 2	34.4%	ORF 2	35.9%	all day
Belgium N	Adults 15+	VTM	30.8%	VTM	31.3%	17-23h
Belgium S	Adults 15+	RTL-TVI	23.5%	RTL-TVI	24.6%	17-23h
Denmark	Adults 12+	TV 2	36.7%	TV 2	38.4%	all day
Finland	Adults 10+	MTV 3	42.0%	MTV 3	42.0%	all day
France	Adults 15+	TF 1	34.9%	TF 1	34.8%	all day
Germany	Adults 14+	RTL	14.9%	ARD	15.9%	all day
Greece	Individuals 6+	ANT 1	23.0%	ANT 1	23.8%	all day
Iceland	Adults 12-80	n.a.	n.a.	RUV TV	46.0%	9-3h
Ireland	Adults 15+	RTE 1	34.9%	RTE 1	37.0%	all day
Italy	Adults 15+	RAI 1	22.9%	RAI 1	23.0%	all day
Luxembourg	Adults 12+	RTL TELE LETZ.	19.7%	RTL TELE LETZ.	21.3%	19-23h
Netherlands	Adults 13+	RTL 4	17.0%	RTL 4	18.7%	all day
Norway	Adults 12+	NRK 1	36.6%	NRK 1	38.4%	all day
Portugal	Adults 15+	SIC	47.7%	SIC	48.8%	all day
Spain	Adults 16+	TVE 1	25.7%	TVE 1	26.4%	all day
Sweden	Adults 15+	TV 4	27.3%	SVT 2	27.6%	all day
Switzerland FR	Adults 15-74	TSR 1	28.1%	TSR 1	29.3%	all day
Switzerland GER	Adults 15-74	SF 1	26.3%	SF 1	25.6%	all day
Switzerland IT	Adults 15-74	TSI 1	25.5%	TSI 1	24.6%	all day
United Kingdom	Adults 16+	ITV	31.8%	ITV	32.2%	all day
Total Western Europe			29.2%****		30.7%	
Belarus	Adults 12+	ORT	51.5%	ORT	49.4%	all day
Bulgaria	Adults 14+	KANAL 1	55.9%	KANAL 1	49.2%	all day
Croatia	Adults 10-74	HTV 1	57.3%	HTV 1	53.5%	7-1:30h
Czech Republic	Adults 15+	NOVA	50.3%	NOVA	51.6%	all day
Estonia	Adults 18-74	ETV	18.2%	ETV	20.2%	all day
Hungary	Adults 18+	TV 2	36.7%	TV 2	31.2%	all day
Latvia	Adults 4+	LNT	26.0%	LNT	38.1%	all day
Lithuania*	Adults 12+	TV 3	33.1%	TV 3	29.6%	6-1:30h
Macedonia	Adults 14+	MTV 1	35.7%	MTV 1	33.7%	all day
Poland	Adults 16+	TVP 1	28.2%	TVP 1	30.8%	all day
Romania	Adults 15+	TV ROMANIA 1	37.3%	TV ROMANIA 1	43.9%	all day
Russia**	Adults 16+	ORT	29.6%	ORT	42.1%	6-1h
Slovakia	Adults 14+	TV MARKIZA	62.4%	TV MARKIZA	58.0%	all day
Slovenia***	Adults 15+	POP TV	30.9%	POP TV	39.5%	all day
Turkey	Adults 20+	SHOWTV, KAN. D	15.6%	ATV	18.2%	all day
Ukraine	Adults 15+	INTER	35.2%	INTER	28.6%	all day
Total Centr./East. Europe			37.7%		38.6%	
Total Europe			33.0%****		34.1%	
Brazil	Individuals 2+	TV GLOBO	53.0%	TV GLOBO	56.9%	6-24h
Israel	Adults 18+	CHANNEL 2	28.0%	CHANNEL 2	43.2%	all day
Japan	Individuals 7+	NTV	23.0%	NTV	23.0%	5-24h
Mexico	Adults 13+	CHANNEL 2	31.3%	CHANNEL 2	30.8%	all day
South Africa	Adults 15+	SABC 1	52.4%	n.a.	n.a.	6-23h
United States	Adults 18+	ABC & CBS	13.0%	CBS	14.0%	all day

Sources: Médiamétrie, Local Institutes

99 12-74; **New panel system launched 1999; Target Group '98 18+; **99 18-75, ****only available figures

AUDIENCE SHARE OF THE LEADING CHANNEL YOUNG ADULTS/CHILDREN							
Country	Target Group Young Adults	Channel	Share '99	Target Group Children	Channel	Share '99	Timeslot
Austria	12-49	ORF 1	29.5%	3-11	ORF 1	36.7%	all day
Belgium N	15-34	VTM	21.5%	4-14	KETNET	23.9%	17-23 h
Belgium S	15-34	RTL-TVI	22.5%	4-14	CLUB RTL	24.1%	17-23 h
Denmark	12-30	TV 2	31.2%	4-11	DR 1	37.3%	all day
Finland	15-34	MTV 3	43.0%	n.a.	n.a.	n.a.	all day
France	15-34	TF 1	35.5%	4-10	TF 1	38.0%	all day
Germany	14-49	RTL	17.8%	3-13	SUPER RTL	18.7%	all day
Greece	15-34	MEGA	24.7%	6-14	MEGA/ANT 1	20.3%	all day
Iceland	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a. n.a.
Ireland	15-34	RTE 1	23.9%	4-14	NET 2	29.6%	all day
Italy	15-34	CANALE 5	24.9%	n.a.	n.a.	n.a.	all day
Luxembourg	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a. n.a.
Netherlands	20-34	RTL 4	17.3%	6-12	RTL 4	12.4%	all day
Norway	12-49	TV 2	31.3%	3-11	NRK 1	35.9%	all day
Portugal	15-24	SIC	49.3%	4-14	SIC	50.7%	all day
Spain	13-24	ANTENA 3	26.2%	4-12	ANTENA 3	29.5%	all day
Sweden	15-34	TV 4	28.8%	3-14	SVT 1	32.9%	all day
Switzerland FR	15-49	TSR 1	25.1%	n.a.	n.a.	n.a.	all day
Switzerland GER	15-49	SF 1	18.4%	n.a.	n.a.	n.a.	all day
Switzerland IT	15-49	TSI 1	20.2%	n.a.	n.a.	n.a.	all day
United Kingdom	16-34	ITV	30.6%	4-15	ITV	26.9%	all day
Total Western Europe			27.5%***			29.8%***	
Belarus	12-34	ORT	46.0%	n.a.	n.a.	n.a.	6 - 2 h
Bulgaria	18-29	KANAL 1	53.0%	n.a.	n.a.	n.a.	all day
Croatia	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Czech Republic	15-54	NOVA	50.6%	4-14	NOVA	50.5%	all day
Estonia	18-30	TV 3	19.9%	12-17	KANAL 2	21.5%	all day
Hungary	18-49	RTL KLUB	33.8%	4-12	RTL KLUB	43.1%	all day
Latvia	12-34	LNT	28.0%	4-12	LNT	30.0%	all day
Lithuania	12-34	TV 3	35.0%	n.a.	n.a.	n.a.	all day**
Macedonia	14-49	MTV 1	33.1%	n.a.	n.a.	n.a.	all day
Poland	16-29	POLSAT	27.6%	4-15	POLSAT	29.6%	all day
Romania	15-44	TV ROMANIA 1	30.6%	6-14	TV ROMANIA 1	33.4%	all day
Russia*	16-39	ORT	26.7%	6-15	ORT	25.0%	all day
Slovakia	14-29	TV MARKIZA	66.5%	n.a.	n.a.	n.a.	all day
Slovenia	18-49	POP TV	48.9%	4-14	POP TV	28.7%	all day
Turkey	20-34	KANAL D	17.1%	5-11	KANAL D	22.4%	all day
Ukraine	15-44	INTER	31.3%	4-14	STUDIO 1+1	27.5%	all day
Total Central/Eastern Europe			36.5%***			31.2%***	
Total Europe			31.5%			30.4%***	
Brazil	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Israel	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Japan	n.a.	n.a.	n.a.	7-12	NTV	20.0%	5-24h
Mexico	13-44	CHANNEL 2	30.3%	4-12	CHANNEL 5	28.5%	all day
South Africa	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
United States	18-49	ABC & NBC	12.0%	2-11	WB	10.0%	all day

Sources: Médiamétrie, Local Institutes

*Peoplemeter system launched 1999, **before 99: 6:00-01.30, ***only avaiable figures

Viewing Time

Viewing time is a good indicator of the importance that TV has in our daily life. With an average of more than three hours in the countries analysed, watching TV is one of our most, if not the most important leisure activity worldwide. People in the country with the greatest amount of viewing time, Macedonia, spent an average 4 hours and 35 minutes daily in front of their TV screen in 1999. It should, however, be kept in mind that the way in which audience research data is measured and collected has an influence on the figures published. The diary method – for instance – tends to over-estimate viewing time compared to measurements by electronic measurement systems such as the people-meter.

Other factors influencing viewing time are, for instance, the number of channels available in a country. History of Television has shown that the more channels available, the higher the average viewing time. Younger people have a lower daily viewing time, therefore countries with a lower average age tend to have a lower time spent viewing. Last but not least, live coverage of big events has a positive impact on the viewing time. In terms of sport events of international interest, 1999 was not as important as the preceding year with the Football World Cup in France and the Winter Olympic Games in Nagano, which glued people to their television sets. 1999 saw the qualifications for EURO 2000 and the Alpine World Championship in Austria, but these did not attract as many spectators as the sport events the year before. Nevertheless, in 9 Western European countries, in 7 Eastern European countries, in Mexico and the USA, the daily viewing time increased.

TV consumption, considered as viewing time, shows remarkable differences in the countries analysed. Having a look at Western Europe, people in the South spent more time in front of their TV screens than people in the North. The Italians, Spanish and Greeks dedicated more than 220 minutes daily to watching TV, around one hour more than the inhabitants of the Scandinavian countries, Sweden, Denmark, Finland and Norway. In Eastern Europe there is a higher TV consumption than in Western Europe, but not as high as in Japan and the USA.

It is interesting to note that the viewing time for children is far lower than the viewing time for adults. Estonian children seem to be the most dedicated to TV, followed by children from Hungary, Mexico, USA, Portugal and Latvia, who all spent more than 3 hours watching TV every day. This is in contrast to children from Austria, Northern Belgium and Denmark, who spent only half of this time in front of the TV screen.

Our look at the average numbers reveals some other interesting facts concerning the viewing habits in the different countries that correlate to the cultural habits in Europe: the way of using the television. Next to the universal TV prime time in the evening, the south European countries tend to have a second prime time around lunchtime. The Spanish, for instance, prefer to watch TV during their “Siesta-time” in the same way as the French. But the biggest curio have the Japanese: they have a third peak in the mornings. Whilst the Europeans tend to be woken up in the morning by radios, the Japanese take the latest news directly from the screen.

VIEWING TIME PER INDIVIDUALS (IN MIN.)						
Country	Target Group	1997	1998	1999	Children	1999
Austria	12+	142	146	147	3–11	69
Belgium N	15+	168	167	164	4–14	87
Belgium S	15+	200	209	208	4–14	109
Denmark	4+	162	170	165	4–11	94
Finland	10+	150	150	161	n.a.	n.a.
France	15+	192	197	199	4–10	122
Germany	14+	196	201	198	3–13	97
Greece	6+	212	219	227	6–14	150
Iceland	12+	131	134	n.a.	n.a.	n.a.
Ireland	15+	188	197	188	4–14	175
Italy	15+	221	230	229	n.a.	n.a.
Luxembourg	12+	115	112	124	12–14	137
Netherlands	13+	157	168	166	6–12	97
Norway	12+	144	151	149	3–11	78
Portugal*	15+	173	165	194	4–14	172
Spain	16+	218	218	220	4–12	158
Sweden	15+	149	154	152	3–14	93
Switzerland FR	15–74	144	151	155	n.a.	n.a.
Switzerland GER	15–74	128	131	136	n.a.	n.a.
Switzerland IT	15–74	155	164	168	n.a.	n.a.
United Kingdom	16+	229	230	232	4–15	157
Total Western Europe		199	205	204		127
Belarus	12+	n.a.	224	n.a.	n.a.	n.a.
Bulgaria	15+	180	184	179	n.a.	n.a.
Croatia	10–75	n.a.	n.a.	214	n.a.	n.a.
Czech Republic	15+	192	198	197	4–14	131
Estonia	18–74	240	245	259	12–17	214
Hungary	18+	235	246	252	4–12	188
Latvia**	4+	210	217	179	4–12	170
Lithuania	15–74	255	177	191	n.a.	n.a.
Macedonia	10+	n.a.	262	275	n.a.	n.a.
Poland	4+	202	208	214	4–15	166
Romania	15+	190	210	214	6–14	166
Russia***	16+	206	215	182	6–15	152
Slovakia	14+	199	185	173	n.a.	n.a.
Slovenia	15+	n.a.	95	163	4–14	131
Turkey	n.a.	n.a.	319	n.a.	n.a.	n.a.
Ukraine	15+	n.a.	197	193	4–14	161
Total Central/Eastern Europe		206	210	201		153
Total Europe		203	208	203		138
Brazil	n.a.	n.a.	211	n.a.	n.a.	n.a.
Israel	18+	n.a.	n.a.	170	4–11	110
Japan	7+	214	222	215	7–9	113
Mexiko	13+	162	178	188	4–12	180
South Afrika	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
United States	18+	254	256	259	2–11	177

Sources: Local Institutes

*since 1999 includes multisets, **people-meter system since 1999, ***new people-meter system since 1999

Audience Research – Feedback of Likes and Dislikes

What is a good programme – what is a flop? In a world of increasing competition and insatiable demand viewers decide who's hot and who is not. There is no general election to vote your favourite series on the primetime schedule – but there are ways to distinguish stars from turkeys.

Valid and reliable data on television audiences is not only requested by the senior management of broadcasting organisations. It is also the main source of advertisers to decide where to invest and which target groups to reach. Scheduling and programme-buying decisions within the stations as well as media-planning evaluations are driven by the same fuel: Audience research.

Audience research is providing a common currency to the three intertwined markets exchanging goods around television: the markets of programme production, of broadcasting and of advertising sales.

But there is a dilemma everyone in the audience research business is facing: The insatiable demand for ever more discriminating data on ever more refined and smaller target groups. Not only do the audiences of media deflate. But brand choice leads to an individualised consumer behaviour, habits and lifestyles are more individualistic than ever before. So the dilemma is twofold, when trying to portray the target television audience with their consumer conduct.

Generally speaking, there are two different ways of collecting quantitative data on the television habits of viewers. In the smaller markets, data production relies heavily on the collaboration and recall of the viewers. With diaries or during interviews, the time-budget of a complete day is reproduced by the respondent. Diaries normally reflect not only the day immediately preceding the day of the interview, but comprise a week or a fortnight. Thus diaries offer more information, but they are harder to handle for the institutes.

In the bigger and more evolved markets, peplemeter systems are deployed in representatively sampled households. In most of the Western and Central European countries such metered ratings services are available to stations, advertisers, and agencies alike.

With the increasing penetration of broadcast satellites, with digital cable and – in some countries already available – digital terrestrial tv-platforms, choice for the viewers is up. Audience research institutes have to concentrate their forces to provide most accurate services. A concentration process can be perceived in the market of television audience research. AGB Italy, once concentrating on the markets in Southern and Central Europe, has been awarded the contract for audience research in Australia from 2001 on, and for the United Kingdom from 2002 on. Besides AGB, there is A.C. Nielsen, GfK, and Taylor-Nelson Sofres providing audience data in Europe. IBOPE, like Italy's AGB a company with WPP's Kantar Group as a major shareholder, is audience research service provider in Central and South America.

Results of audience research have considerable influence on the schedules of television programmes, on advertising expenditures, and the purchase or licensing of broadcasting rights.

In some countries, foremost in Europe, there is a tripartite organisation, a so-called Joint Industry Committee (JIC) steering the conduct of research. The JIC is comprising the stations as financiers of the service, together with the clients from the advertising world, namely advertisers and ad-agencies. In many other parts of the world, there is only the brand label of the institute to guarantee for unbiased, objective, and valid research.

Now, what is a good program, what is a flop? Television audience research data is one of the few sources of feedback programmers and advertisers receive. Although even in a multichannel environment, there are only a few channels being viewed regularly, the analysis of audience demand of new digital offers is a big issue. With the penetration of digital services growing important, we will see technological solutions operating to tackle these issues. And we expect approaches to plan and monitor ever more global marketing campaigns with the help of trans-nationally comparable audience data.

ELECTRONIC AUDIENCE MEASUREMENT						
Country	Population (000)	TV Households (000)	Service	Launch	Panel size Households	Interval of meas.
Western Europe						
Austria	8 094	3 036	TELETEST-FESSEL-GFK/IFES	1991	1 200	30 sec
Belgium North	10 214*	4 301*	N.V. AUDIMETRIE S.A.	1989	750	1 sec
Belgium South	10 214*	4 301*	N.V. AUDIMETRIE S.A.	1985	750	1 sec
Denmark	5 314	2 350	GALLUP A/S	1992	1 000	1 min
Finland	5 171	2 124	FINNPANEL OY	1987	730	1 min
France	60 186	22 580	MÉDIAMÉTRIE/MÉDIAMAT	1989	2 750	1 sec
Germany	82 037	33 560	GFK-FERNSEHFOSCHUNG	1985	5 200	1 sec
Greece	10 554	3 738	AGB HELLAS	1988	800	30 sec
Ireland	3 705	1 215	AC NIELSEN	1996	655	1 min
Italy	57 563	20 911	AUDITEL-AGB Italia	1986	5 000	n.a.
Netherlands	15 760	6 632	INTOMART BV	1987	1 300	1 sec
Norway	4 445	1 827	NORSK TV-METERPANEL***	1992	1 000	30 sec
Portugal	9 979	2 991	MARKTEST-AUDIMETRIA	1998	600	1 sec
Spain	40 559	12 181	SOFRES, A.M.	1988	3 105	1 min
Sweden	8 861	4 030	MMS	1993	1 000	Daily
Switzerland	7 124	2 861	IHA, HERGISWIL	1985	1 750	n.a.
United Kingdom	58 629	23 988	BARB	75	4 485	1 min
Central/Eastern Europe						
Czech Republic	10 321	3 782	TAYLOR NELSON SOFRES-ATO	1997	660	1 sec
Hungary	10 044	3 694	AGB HUNGARY	1994	840	1 min
Poland	38 661	12 929	AGB POLSKA	1994	1 215	1 min
Romania	22 546	6 737	AGB DATA RESEARCH	1998	780	1 min
Turkey	63 000	13 580	AGB ANADOLU	1990	1 630**	1 min
Ukraine	50 245	8 318	AGB UKRAINE	1998	853	n.a.
Overseas						
Brazil	170 100	39 500	IBOPE	1989	2 620	n.a.
Israel	6 041	1 538	TELE-GAL(A.G.B.) LTD.	1998	400	1 min
Mexico	98 795	20 205	IBOPE AGB	1996	2 211	1 min
South Africa	40 584	5 807	SAARF	1993	800	n.a.
United States	263 000	102 380	NIELSEN MEDIA RESEARCH	1987	5 018	n.a.

*total Belgium, **Data from 1998, ***Markeds- og mediainstituttet (MMI)

NEW SERVICES				
Country	TVHH (000)	Service	Launch	Panel Size (HH)
RUSSIA	50 775	TV Index '99: a joint Gall. TV/Russ. Res. serv.	1999	1 200(urban)
LATVIA	981	BMF Gallup Media	1999	208

PANEL EXTENSION				
Country	TVHH (000)	Service	New panel size	Since
DENMARK	2 350	GALLUP A/S	1 000 (+500)	01/00
FRANCE	22 580	MÉDIAMÉTRIE/MÉDIAMAT	2 750 (+450)	10/99
GREECE	3 738	AGB HELLAS	800 (+100)	1999
HUNGARY	3 694	AGB HUNGARY	840 (+220)	05/99
ISRAEL	1 538	TELE-GAL (A.G.B.) LTD.	400 (+15)	2000
NETHERLANDS	6 632	INTOMART BV	1 300 (+300)	1999
NORWAY	1 827	NORSK TV-METERPANEL	1 000 (+500)	01/00
ROMANIA	6 737	AGB DATA RESEARCH	780 (+80)	1999
SPAIN	12 181	SOFRES, A.M.	3 105 (+305)	1999
SWITZERLAND	2 861	IHA, HERGISWIL	1 750 (+100)	1999
UKRAINE	8 318	AGB UKRAINE	853 (+193)	1999

The Pan-European Channels

Born 15 years ago with the development of satellite reception in Europe, the Pan-European TV market (PETV) is increasingly complex to describe. Technology and the maturation of the European TV markets are reshaping its face.

In one year time (1st Quarter 2000) Europe gained an additional 5 millions digital satellite homes, nearly doubling the installed park. Cable networks head-ends are now totally equipped to receive digital signals. Several established PETV channels have already chosen to drop their analogue free-to-air satellite distribution. This was the case this year of EuroNews. Cartoon network and TNT Newly launched channels are also directly opting for a digital satellite distribution. The unified European DVB standard helps this transition. Switching to digital transmission is not just a matter of reducing distribution costs but also a way to be integrated in pay digital platforms and thus enhancing a second revenue flow.

Trends in Pan-European TV market

We can underline 3 main non exclusive trends for pan-European channels:

- Global Becomes local, Local Becomes Global
- The future competition of Pan-European Brands
- Multiplication of niche services

1. Global Becomes local, local becomes global

Localised versions of pan-European channels are multiplying. Its is increasingly fully tailor-made local channels more than simply adding subtitles or voice-over soundtracks to a common pan-European feed, as it was observed for the last previous 7 years.

Time Warner achieved fully localisation of its library based Cartoon network and Turner Classic Movies in 1st Semester 2000. Already well engaged in this process MTV

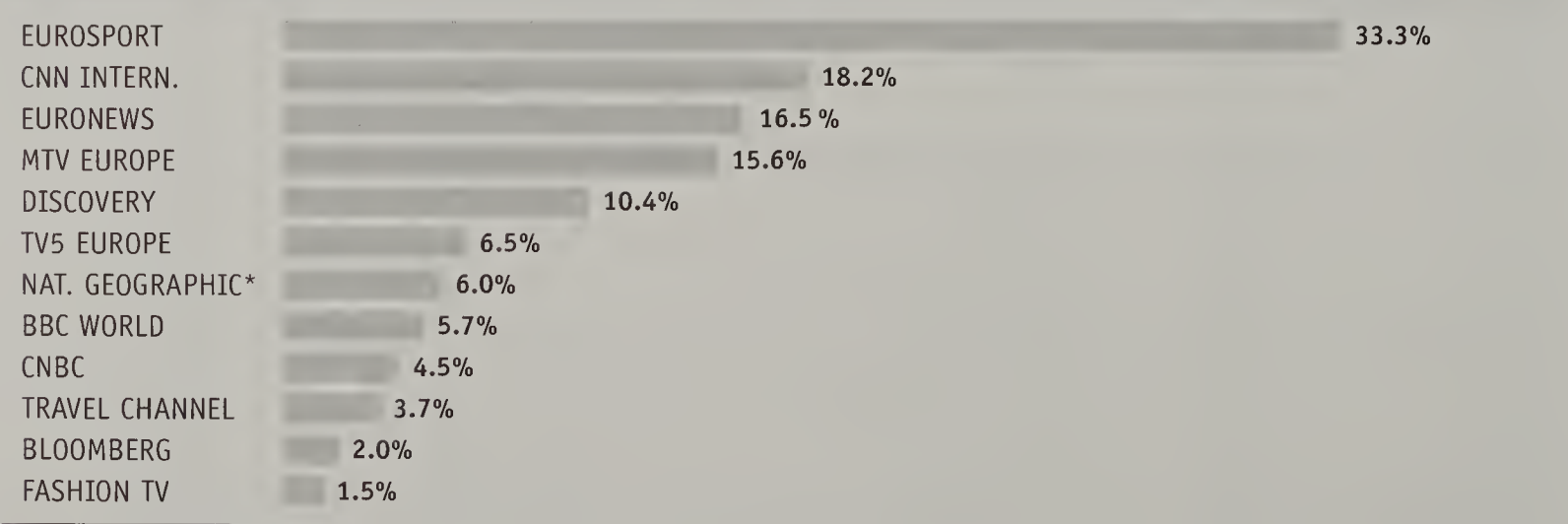
launched a French, Polish, Spanish versions in 2000 alongside its existing German, British, Nordic, Russian and Italian services. A Dutch MTV could follow soon. CNN launched a Spanish CNN+ in 1999 and a CNN Turk in 2000. CNBC will launch 2 local declinations with local partners in 2000, CBNC Nordic and CNBCE (Turkey). Discovery multiplied its local versions, 10 feeds and 13 languages are now offered. The National Geographic Channel which already dubbed its European service in 5 languages and subtitled it in 4 will soon launch in Spain. The channel intends to enter the French and German market in the first quarter of 2002.

Local competitors of pan-European channels are also increasingly seeking extension opportunities in foreign markets. For instance the German music station VIVA acquired Swiss Music channels and rebranded it as Viva Swiss. VIVA has launched VIVA Polska in Poland. French counterpart MCM launched a Romanian spin-off in April 2000 and eyes other Central European countries.

2. The future competition of Pan-European Brands

PETV channels have already to face competition from local services market by market. But new competitors can emerge for pan-European budgets as well with the development of branded channels in several markets. The idea is that a “community of local channels” offering a same programming environment can in the middle term ultimately be syndicated for advertising purposes. The large majority of their advertising revenues will nevertheless continue to come from national budgets, but they will also be able to tap on Pan regional advertising budgets. American companies late to enter European market have taken this “glocal” approach. This is the case for instance of Universal’s 13th street channel, the Disney channel (premium service, advertising free) or Fox Kids Europe. Fox Kids Europe has already a consolidated basis of subscribers of 18 millions homes and has yet to enter the German market.

PAN-EUROPEAN AUDIENCE FIGURES ACCORDING TO EMS 2000 WEEKLY REACH OF THE PAN-EUROPEAN CHANNELS



Source: EMS 2000/TOP 20% main income earners/Universe = 39.7 m

*since Feb. 99

MAIN PAN-EUROPEAN SERVICES						
Channel	Program.	Launch	Main owners	Languages	Local feeds?	Sales House
ANIMAL PLANET	Documentaries	1997	Discovery/BBC	5	Yes	In-house
ARTE	Generalist/Culture	1992	ZDF-ARD/La Sept arte	French, Germ.	No	IP (sponsorship)
BBC WORLD	News	1995	BBC Worldwide	English	No	In-house
BLOOMBERG TV	News/Finance	1996	Bloomberg	5	Yes	In-house
CARTOON NETWORK	Children	1993	Time Warner	5+	Yes (g)	Turner+ local
CNBC Europe	News/Finance	1996	NBC/Dow Jones	English	Yes (a)	In-house
CNN International	News	1987	TimeWarner	4	Yes (b)	Turner Sales
DISCOVERY Europe	Documentaries	1989	Discovery	13	Yes (10)	In-house
EURONEWS	News	1993	ITN/public broadcasters	6	No	In-house
EUROSPORT	Sport	1989	TF1/Canal+	16+	Yes (c)	In-house
FASHION TV	Fashion	1997	Private	1	No	MCM
FOX KIDS EUROPE	Children	1996	Newscorp/Saban	12	Yes	local
FOX SPORTS EUROPE	Sport	2000	Newscorp	3	No	n.a.
MCM	Music/life-style	1993	Lagardere	French + 2	Yes (d)	local
MTV Europe	Music/life-style	1987	Viacom	6	Yes (e)	In-house + local
NAT. GEOGR. TV	Documentaries	1997	FOX/National Geo/NBC	7	Yes	In-house
NICKLEODEON	Children	1993	Viacom	8	Yes (f)	In-house + local
TRAVEL CHANNEL	Travel	1994	Landmark	7	No	In-house
TURNER CL. MOVIES	Classic movies	1993	TimeWarner	5+	Yes (g)	Turner+ local
TV5 EUROPE	Generalist	1983	Public broadcasters*	French	No	In-house
VH 1	Music	1994	Viacom	3	Yes (h)	In-house + local

Source: IP Network/Operators

*F, B, CH, Canada

(a) CNBC Europe launched with local partners a Nordic feed (April 2000) and will launch a turkish version CNBCE in the Autumn 2000

(b) CNN International launched a Spanish version (CNN+) in 1999 and a Turkish one CNN TURK in S1.2000. CNN broadcasts daily 15 min. in German-speaking territories

(c) Eurosport has specific feeds for France, Nordic countries and UK isles (British Eurosport)

(d) MCM has split feeds for France, Romania (May 2000) and "international"

(e) MTV has specific services for Italy (1996), Germany (1997), UK (1997), Nordic countries (1998), Russia (1999), France (June 2000), Poland (July 2000), Spain (2000)

(f) Nickleodeon has local services in UK, Nordic countries, Turkey, Hungary (1998), Russia (1998) , Spain (1999)

(g) TimeWarner fully localized its Cartoon Networks and TCM - Turner Classic Movies (formerly TNT) in 1st Semester 2000.

(h) VH-1 UK, Germany and Export / VH1 launched this year VH1 classics

European born players are also following the same path. Multithematiques (a subsidiary of Canal+) markets channels like Planete (documentaries), Seasons (hunting & fishing channels) in different European territories. Since 1998 Europe’s largest cable operator UPC is busy creating channels to be offered on a Pan-European basis (Extreme TV, Reality TV,...). UPCTv, its programming arm offers these channels to other cable operators and satellite platforms.

3. Multiplication of niche services

Pan-European actors tend to capitalise on their experience to roll out new services over the continent. Eurosport (now fully controlled by French broadcasters TF1 and Canal+) expects to launch a Pan-European Sport Information channel in September 2000. The service will be initially available in English, Polish and Turkish. Disney’s ESPN which sell out of Eurosport in 2000 is expected to return to the European market in 2001 with its own niche sport. Fox Kids Europe helped sister company Fox Sports to launch in Central Europe in May 2000, taking care of marketing and distribution (Fox sport broadcasts between

7pm to 6am on Fox Kids frequencies).

NatGeo intends to roll out its youth-targeted spin- off service “Adventure One” over Europe in the coming years. Discovery has the same objective for “Discovery Health” and “Discovery Travel & Adventure”. MTV has developed several spin-offs (VH1, VH1 classic, MTV Base, MTV2) and is customising for the different national markets. Disney also plans to launch its “Toon Disney” channel internationally alongside its premium family service, as well as Playhouse, a pre-school children channel.

New players are also trying to breakthrough in the Pan-European arena. These “independent” pan-European services are often offered free-to-air in the digital mode. Their business models rely more on home shopping, B-to-B and E-commerce revenues than on classical advertising. Examples are LibertyTV (Travel channel broadcast in 4 languages), Wishline (luxury lifestyles), InvestTV (personal finance), Game Network (dedicated to video-games and multimedia), Alice (Cultural lifestyle) or longer established Fashion TV.

ESTIMATED RECEPTION CABABILITY IN EUROPE (IN MILLION HOMES)			
Channel	Full time	Part time	Total distribution
ANIMAL PLANET			9.0*
ARTE	62.3	12.6	75.0*
BBC WORLD	43.1	3.1	43.1
BLOOMBERG TV	9.8	54.7	55.6
CARTOON NETWORK	n.a.	n.a.	n.a.
CNBC EUROPE	30.8	30.4	44.8
CNN INTERNATIONAL	70.6	15.0	83.8
DISCOVERY EUROPE	20.1	n.a.	20.1
EURONEWS	34.3	67.7	93.7
EUROSPORT	86.5		86.5
FASHION TV			18.0*
FOX KIDS EUROPE			18.0*
FOX SPORTS EUROPE			3.0 (at launch)
MCM			15.0*
MTV EUROPE	80.2	3.2	81.4
NATIONAL GEOGRAPHIC CHANNELS	18.0		18.0**
NICKLEODEON			8.5*
TRAVEL CHANNEL			4.5*
TURNER CLASSIC MOVIES	n.a.	n.a.	n.a.
TV5 EUROPE	62.9	1.1	62.9
VH 1			22.0*

Source: PETV research group – Q1.2000 except

* IP network estimates at 2nd Semester 1999 or Q1.2000 / ** NGC April 2000

Partial time/ day distribution: programmes retransmitted for a limited number of hours per day via terrestrial or cable networks. Full time distribution: 100% of broadcast hours for the considered channel.

Distribution

There are close to 100 millions multichannel households in Europe. Thanks to a higher cable and satellite penetration, Northern Europe still represents the core of the pan-European channels distribution, even if fast-growing satellite or cable distribution in Southern Europe open new opportunities. International channels are also increasingly eager to develop their brand in Central and Eastern Europe.

Eurosport is the number one network in term of full-time distribution with 87 million homes receiving its programme (up 6 million homes compared to Q1.99) ahead of MTV (80m homes, up 2.5 m), CNN (71m, up 1.8m) and TV5 Europe (63m, up 5.3m). BBC World (43m) gained 3.9m homes and CNBC (31m) 3.1m . Terrestrial distribution can strengthen the distribution of PETV channels. Cultural service Arte owns a terrestrial national frequency in France while MTV Italy uses Rete A's national frequency to distribute its programmes. EuroNews benefit from partial day retransmission on some of its public shareholders' terrestrial networks.

Audience measurement

There is still a strong for more reliable and complete research in Pan-European media. New initiatives have been launched over the last 2 years. The question remains however of how many costly surveys the European market has room for.

With first results released in July 2000. Europe 2000 is conducted by Ipsos-RSL and intends to measure the Print and TV habits of Europe's top 4% income earners in 16 countries. Europe 2000 TV is sponsored by BBC World, CNN and CNBC, but has been much criticised by other TV channels and some agencies for its narrow universe and the accuracy of its methodology. Contrary to its five-year-old rival European Media and Marketing Survey (EMS) Europe 2000 promises to give 1/4h ratings and to allow GRP analysis. In its 5th year EMS has become the reference survey for top 20% income earners in Europe. EMS is subscribed by all PETV channels. In 1999 British research company BMRB rolled out its TGI study in several countries. This study extended socio-demographics and product & brand consumption profiles of the viewers of local and Pan-European TV channels.

AUDIENCE MEASUREMENT OF PETV					
NATIONAL PEOPLEMETER SYSTEMS					
Eurosport (8 countries: D, GB, ES, PL, NL, DK, B, Sw)					
Eursoport consolidates national data to estimate pan-European audience					
MTV (6 countries: NL, GB, Sw, Dk, PL, I)					
MTV does not fully subscribe to peoplemeter systems in each countries. They also use monthly snapshots to extrapolate audience					
Euronews (4 countries: D, PL, Sw, ES)					
Euronews also access peoplemeter data for its terrestrial windows on national public broadcasters					
Bloomberg (1 country: GB)					
RECALL STUDIES					
Study	Institute	Field period	Countries	Sample	Universe ('m)
EMS 2000	Inter/view		16 (EC countries, exept Gr.+NW+CH)	32 000 top 20% income earners (incl. 2 273 sen. man.)	40
EBTVS	IPSOS RSL	March-Apr.1999	4 (GB, D, F, ES)	2 250 (senior executive & financial prof.)	0.266
IATS	EDR		16 (EC countries)	51 500 international travellers (airport)	3.1
TGI EUROPA	BMRB	Apr.-July 1999	4 (GB, D, ES, FI)	65 000 Adults 15+	191.0
EUROPE 2000 TV	IPSOS RSL	March 2000	16 (EC countries)	7 000 adults top 4% working population 25+	10.8
THE PETV ADVERTISING MARKET IN 1999					
Top 10 product sectors in PETV (in SOV)			Top 10 brands (by spent/in Euro/Gross)		
AUTOMOTIVE	14%		ALLIANZ	13.4m	
CULTURE-LEISURE	13%		HYUNDAI (range)	10.3m	
SERVICES	13%		SWATCH	9.6m	
CLOTHING/ACCESSORIES	9%		LEVI's Staprest	8.0m	
TELECOMMUNICATION	9%		DIESEL	7.3m	
TRAVEL-TOURISM	9%		ADIDAS	7.2m	
DRINKS	6%		AT&T DIRECT	4.9m	
IT/COMPUTERS	6%		JP MORGAN	4.2m	
SPORTS EQUIPMENT	4%		BUDWEISER	4.2m	
INFORMATION/ MEDIA	3%		NOKIA	4.2m	
TOTAL GROSS AD EXPENDITURE (in million Euro)					376.7
Source: SECODIP EuroTV Adex (Taylor Nelson Sofres)					
January-December 1999 / Gross based on rate cards prices					
6 channels monitored: BBC World, CNBC, CNN int., Euronews, Eurosport, MTV					
Data shown exclude all direct response ads, sponsorship revenue, CNN hotel scroll and any revenues from local windows					

But the hottest topic remains the electronic measurement of pan-European services. TV networks with broad audience basis increasingly favour the electronic measurement through the national people meter systems. Eurosport is the most advanced pan-European channel in this field, compiling data from the peplemeters of 8 countries (a global panel of 10 000 meters). 70% of the homes receiving Eurosport are today electronically surveyed. MTV and EuroNews are also gearing in this direction.

This trend towards electronic measurement is reinforced by the development of local feeds. To attract national budgets localised channels need to use the same audience currency as the other national channels they are competing with. But accessing peplemeter data is costly, not always technically feasible (only 16 countries measured cable/ sat services in their electronic panels) and not always relevant for channels with niche audience or limited distribution.

Advertising

Since 1999, Secodip (part of the Taylor Nelson Sofres group) has monitored ad expenditure on PETV. Six main channels are monitored: BBC World, CNBC Europe, CNN Int., EuroNews, Eurosport and MTV. 1999 saw 760 brands investing Euro 377m in the PETV. These data exclude all direct response ads, although these are monitored by Secodip. Figures also exclude the important sponsorship revenues, CNN hotel scroll and any revenue from local windows. Automotive is the #1 sector investing on PETV, followed by culture-leisure and services.

These figures are based on rate cards and therefore do not take into account often huge discount policies. Media

specialists usually agree to estimate the total net Pan-European TV market at around Euro 300m (sponsorship included) which represent less than 1.5% of the European TV advertising market. This remains rather modest. However Pan-European channels report strong growth in first quarter of 2000 compared to Q1.1999: +46% (gross figures).

The future of many networks will depend on their ability to attract national budgets. Networks ahead in their localisation get the majority of their revenues from their local feeds. For instance 2/3 of MTV Europe revenues were generated in 1999 by local ad windows.

Conclusion

The explosion of local distribution opportunities is seriously challenging the concept of Pan-European TV channels.

Local competition to these international services is fiercer than ever with European media groups gaining muscles. Spurred by the prospect of digital terrestrial multiplex public broadcasters are on the verge to develop a range of thematic channels, directly competing with pan-Euro services. Localisation remains therefore one the hottest topic as international channels fight for local relevance for the viewers and for the advertisers.

Despite a strong demand for reliable research Pan-European TV broadcasters have once again failed to achieve a consensus on an unified system of audience measurement. The prospect of such a consensus to be achieved soon is fading, each PETV seeming to pursue their own agenda that are increasingly diverging, as are their audience targets.

Digital Television in Europe

Digital Bouquets started in 1996 in Europe, two years after the launch of DirecTV in the USA. 4 years later, the penetration of digital TV in Europe is showing huge discrepancies between countries. In more advanced countries like United Kingdom, Spain or France over 10% of the homes subscribe to pay digital TV, a percentage comparable to the USA rate. Digital penetration is higher in countries with traditionally low cable penetration like Spain, France and the UK while it remains weak in countries where analogue cable penetration is historically high and where cable is considered as a commodity (like in the Benelux and Germany).

About 12m European homes subscribe to digital services as end March 2000 according to IP estimates. Satellite is by far the leading method of receiving digital services with 9.9m homes subscribing to digital satellite bouquets (83% market share) while digital cable accounted for ca 1.4m households (12% of the market), followed by digital terrestrial television with 0.7 m homes (7.4% market share).

Digital Satellite

From March 30th 2000, Europe had 15 Direct-To-Home pay satellite services in operation. The 5 biggest platforms in term of number of subscribers were Sky Digital (UK, 2.8m), CanalSat (France, 1.4m), TPS (France 0.9m), CSD (Spain, 0.9m) and D+ (Italy, 0.8m).

Anticipated mergers between competing platforms in Spain and Poland have not occurred. Competition has even heated up in Italy with the fledging Stream Digital platform now backed by two heavyweights (Telecom Italia and Newscorp) and in Scandinavia where the analogue Viasat bouquet (a subsidiary of Modern Times Group) launched its digital satellite platform in second semester 2000 to compete with Canal+ service. In Germany a second Digital-television platform launched in September 1999 to take a piece of the market dominated by Kirch's Premiere World and Deutsche Telekom's cable services. Free Universal Network is backed mainly by German public broadcaster ARD, with support from a handful of hardware manufacturers, retailers and small TV companies. FUN relies on software from OpenTV while the German market is currently dominated by Kirch's proprietary "d-box" decoders. So far FUN is only available by satellite and lacks distribution on cable and on exclusive programming.

Two new countries entered the digital DTH era during the first semester of 2000: the Netherlands with Canal+'s bouquet and Turkey with Digiturk backed by a Turkish media company. New DTH services are expected in Greece (a project backed by the telecom operator OTE), in the Baltic states (Viasat) and Central Europe (backed by UPC). UPC plans to launch a DTH service in Hungary, the Czech Republic and Slovakia this autumn. UPC – the dominant cable-TV provider in Hungary, the Czech Rep and Slovakia – already provides satellite television in Poland.

Digital cable

With developments and consolidation moves occurring almost daily, the European cable market appears to have moved up a gear in its desire to play a bigger role in the digital revolution. At the end of 1999, digital cable homes still represented less than 2.5% of the total European cable homes. France is ahead in "digitalisation" of its subscribers with 420 000 digital cable homes (15% of the total French cable subscribers, end March 2000). Scandinavian cable companies are also well advanced in their digital move while others countries were still in a prelaunch phase. Long delayed digital cable platforms are now expected to roll out rapidly in the UK after the market achieved consolidation with two dominant players: NTL and Telewest.

The needed huge investment levels to upgrade networks has led to consolidation. Virtually every cable system in Europe is about to be sold, being sold or someone is planning to sell it. The former Telecom monopolies tend to exit their cable ventures (at least in their domestic market) in response to pressure from European regulators, who want former state telcos like Deutsche Telekom to sell their cable assets in order to foster competition in the telecommunications market. Several newly established cable-operators are bidding for Deutsche Telekom's cable assets, which the former monopoly is being pressured to shed by regulators. To fracture future competition and get a better price, Deutsche Telekom is unloading the network of 18 million subscribers in pieces.

Three new aggressive players have emerged on the European scene, all with US-investment, UPC, Callahan & Associates International (CAI) and NTL.

United Pan-Europe Communications NV has acquired 10% of the European cable market in less than 2 years. The company has pounced on European cable assets that have come up for sale, putting together an impressive network of cable wiring that spans 12 European countries and Israel. UPC which hasn't yet celebrated its 5th birthday is the second-biggest cable operator in Europe in terms of subscribers, surpassed only by Deutsche Telekom. UPC had 8.4 m basic cable subscribers (12.9m homes passed) as of March 31, 2000 (when pending deals are closed). UPC will also acquire the 25% of Telewest, Britain's second cable operator, from parent company UnitedGlobalCom as part of a series of related transactions resulting in Liberty Media (ATT) taking control of UnitedGlobalCom in June 2000.

Deutsche Telekom has agreed to sell 2 of its nine franchises to Callahan Associates, the Denver-based cable operator. Callahan also expects to take a 55 percent stake in Belgian Telecom and cable company Telenet as well as in 10 municipally owned cable systems which account for a large chunk of the cable industry in the Flemish region of the country. Parties will finalise the deal by the end of the summer

2000. CAI is aiming to build a “pan-European property base,” building on existing cable investments in Spain (ONO) and France. CAI and its partners had 4.9m subscribers in Europe and 8.7m homes passed as March 2000. CAI is thought to have less than 100 000 digital cable subscribers.

The acquisition of Cable & Wireless by NTL has led to the creation of UK’s largest cable operator. France Telecom has sustained NTL’s development by acquiring a 25% minority stake in the British cable operator. NTL is expected to strengthen its position in continental Europe by taking a stake in the cable operations covering the region around Frankfurt (formerly owned by DT). Over the past two years the company has completed more than 15 acquisitions and has been upgrading the networks of some of the companies it has acquired over the past year, including Irish cable company Cablelink In 1999, NTL acquired Switzerland’s largest cable operator, Cablecom, and the French-owned 1G Networks. NTL has around 3.5m subscribers in Europe and intends to meet its objectives of 500,000 total digital customers by the end of 2000.

Digital Terrestrial Television

The United Kingdom was the first European country to embark on the DTT course. The British On Digital bouquet was launched in November 1998, just 15 days after BskyB launched its satellite digital bouquet. In April 1999, it was Sweden’s turn to go for terrestrial digital TV, while Spain’s first digital terrestrial platform, Quiero Television, started regular broadcasting in April 2000.

The uptake of Digital TV is outperforming forecasts in the UK. After a disappointing start, on Digital is now in line with its objective to garner around 1 million digital subscribers by the end of 2000. Nevertheless, marketing costs for the two competing platforms (Sky Digital and On Digital) have rocketed with both platforms offering free set-top boxes in order to boost their installed park. On Digital still depends heavily on Sky’s premium programming (films and sport rights). But BSKYB’s competitors are strengthening their own premium programming.

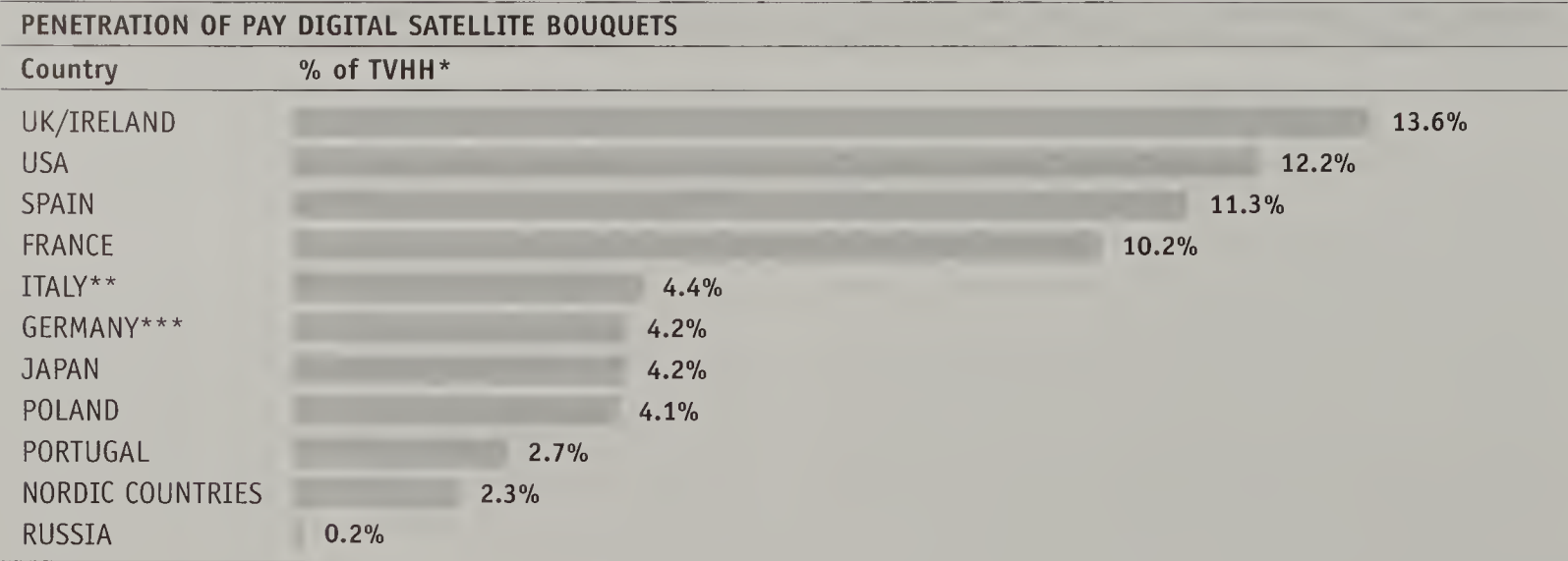
The beginning of Digital Terrestrial Television was disappointing in Sweden. The UK and Sweden adopted different

approaches to DTTV. The Swedish government tried to keep a tight reign on digital broadcasting. SENDA (in which broadcasting network Teracom holds 90% stake and public broadcaster 10%) was established to act as marketing and management organisation. Digital Terrestrial Television’s debuts suffer from delays, shortage of channel capacity and lack of marketing aggressiveness. So that one year after launch the service had a mere 13000 subscribers basis.

Launching with 14 theme channels, including seven dedicated to movies, and marketing itself as a cheaper and easier alternative to satellite platforms, Quiero Television hopes to find a niche in Spain’s tough market. Quiero is competing with direct-to-home platforms Via Digital led by Telco Telefonica and Canal Satélite Digital backed by Canal+. Subscribers of Quiero TV will be able to receive digital signal of free-to-air private and public broadcasters. Quiero TV is backed by Retevision (45%), Spain’s second-largest telecoms company, aligned with Telecom Italia SpA. Spanish content providers Mediapark (15%), Grupo Planeta (10%) and UK media group Carlton (7.5%) are its partners. Quiero TV hopes to attract 100 000 subscribers by the end of 2000. At launch the platform could reach 60% of the Spanish population. Two other digital terrestrial multiplexes are expected to be granted in the autumn.

Perspective

Satellite DTH platforms will continue to dominate the European digital scene for a while. Cable’s digital move has been delayed by the reshaping of the European cable industry. In the middle term, cable can, nevertheless, prove to be a fierce competitor, not only offering digital TV but also cheap telephony and broadband Internet access. DTT could be a real challenger to satellite. The prospect of a general switch-off from analogue to digital distribution for the existing TV networks is also painting a rosy picture for digital terrestrial television. But while satellite platforms are already well established on the market, DTT platforms are still in their infancy and often cruelly lack premium programming. Some major countries like France and Italy would also favour a free-to-air approach for the terrestrial frequencies instead of developing new distribution mode for pay bouquets. Finally, other distribution channels for television can appear in the long term like high speed ASDL technologies.



PAY DIGITAL BOUQUETS TV				
Country	Service	Ownership	Launch date	Subscribers
Belgium – N	CAN.DIGITAAL (cable)	C+/Cable cies	1998	27 783
Belgium – S	LE BOUQUET (cable)	C+/Cable cies	Jan. 1999	30 743 (a)
France	TPS	TF1/M6/Lyonnaise/France Telecom-TV	Dec. 96	880 000
	CANALSAT	C+ (66%)/Lagardère (34%)	Apr. 96	1 414 387 (b)
Germany	PREMIERE WORLD	KIRCH/BSKYB (24%)	1999 (DF1 1996)	1 420 000 (c)
Greece	NOVA	Multichoice Hellas/TELETYPOS (Mega)	1999	25 000
Italy	STREAM (DTH only)	Telecom Italia (50%)/Newscorp (50%)	1998	155 000 (DTH) (d)
	D+ (Bouquet)	Canal+	1996	761 484 (e)
Nordic Countries	CANAL DIGITAL	Canal+/Telenor	1997	321 029
Poland	CYFRA+	Canal+/Polish companies	1998	285 938
	WIZJA TV	UPC (via@entertainment)	1998	245 000
Portugal	TV CABO (DTH)	TV CABO	1998	80 000
Russia	NTV+	NTV (Media Most Group)	Nov. 1998	120 000
Spain	VIA DIGITAL	Telefonica (49%)	Feb.1997	500 000
	CANAL SATEL. DIG.	Sogecable (C+/Prisa), TimeWarner (10%)	Sept.1997	878 315
UK	SKY DIGITAL	BSkyB (Newscorp 40%/Vivendi 25%)	1998	2 751 000
Free-to-air DTH				
Germany	ZDF.VISION	ZDF	n.a.	1 100 000 (free)
	FUN TV	ARD	2000	60 000
Digital Terrestrial TV (pay bouquets)				
UK	ON DIGITAL	GRANADA (50%)/ ARLTON (50%)	Nov. 1998	673 000
Spain	QUIERO TELEVISION	RETEVISION(45%)/MEDIAPARK (15%)/	May 2000	launched in May
		PLANETA (10%)/CARLTON (7.5%)		
Sweden	SEDA	Teracom (90%)/SVT (10%)	Apr.1999	13 000
New DTH Services				
Baltic Countries	VIASAT BALTIC	Modern Times Group	to be launch. in Sep. 2000	n.a.
Central Europe	UPC DIGITAL PLATFORM	United Pan-European Communications	to be launch. in 2000-2001	n.a.
Greece	ALPHA	ERT/OTE (telecom)/Alpha TV	to be launch. in 2000-2001	n.a.
Netherlands	CANALDIGITAAL NL	Canal+	Mar. 2000	n.a.
Nordic Countries	VIASAT DIGITAL	Modern Times Group	to be launch. in July 2000	n.a.
Turkey	DIGITURK	NTV Turkey	April 2000	n.a.
Main DTH platforms in the rest of the world				
Canada	BELL EXPRESSVU	Bell Canada Entreprises	Sept. 1997	500 000
	STAR CHOICE	CANCOM (Shaw)	1997	375 000
Japan	SKY PERFECTV (g)	Various	Oct. 1996	1 820 000
South Africa/				
Middle East	DSTV	MIH	1996	ca 500 000
South America	SKY LATIN AMERICA	NewsCorp/Liberty Media/Televisa/Globo	1996	931 000
	GLA–DIRECTV	Hughes Electron./Cisneros	1996	900 000
USA	DISH NETWORK	ECHOSTAR	1996	3 630 000
	DIRECT TV/USSB (f)	Hugues Electronics	1994	8 300 000

(a) Total: 42000 homes receiving Le Bouquet or Canal+ digital multiplex
 (b) AB SAT/ 430 000 DTH homes incl. In TPS & CanalSat
 (c) Total digital : 1 420 000 homes (Bouquet or Premiere Digital) + 722 000 subscribers to Premiere Analog
 (d) 500 000 subscribers to DTH or cable service
 (e) 1 060 000 subscribers to Telepiu+ digital or D+ or Calcio+
 (f) DirecTV acquired Primestar in 1999
 (g) DirecTV Japan merged with SkyPerfect in 2000
 Source: Operators / IP Network etimates by end Q1.2000

Advertising Expenditure

ADVERTISING EXPENDITURE GROSS					
Country	Total adspend (in million EUR)	TV adspend (in million EUR)	% TV share	TV adspend in % of GDP	TV adspend per capita (in EUR)
Austria	1 716	425	24.8%	0.22%	52.4
Belgium	1 674	691	41.3%	0.34%	66.3
Denmark	1 180	427	36.2%	0.21%	80.1
Finland*	943	205	21.7%	0.17%	39.5
France	13 080	4 380	33.5%	0.33%	72.2
Germany	16 215	6 942	42.8%	0.35%	84.6
Greece	1 527	633	41.4%	0.58%	55.9
Iceland	98	28	28.7%	0.32%	99.8
Ireland	568	173	30.0%	0.23%	47.2
Italy	20 063	6 643	59.2%	0.65%	115.5
Luxembourg	71	8	10.8%	0.04%	17.8
Netherlands	3 169	1 178	37.2%	0.32%	74.2
Norway	1 442	469	32.4%	0.31%	97.2
Portugal	1 451	941	57.6%	0.97%	94.7
Spain	8 739	5 835	40.4%	1.05%	142.0
Sweden	2 573	991	38.5%	0.43%	112.0
Switzerland	2 271	377	16.7%	0.18%	52.5
United Kingdom	12 572	5 791	46.1%	0.46%	98.1
Total Western Europe	89 352	36 137	40.4%	n.a.	92.9
Belarus	n.a.	9	9.0%	0.35%	0.9
Bulgaria	66	35	53.0%	0.28%	4.2
Croatia	126	94	74.1%	0.49%	21.8
Czech Republic	582	323	54.6%	0.60%	27.7
Estonia*	41	8	20.4%	0.20%	6.2
Hungary	679	369	54.4%	0.80%	35.6
Latvia*	40	13	31.8%	0.20%	5.1
Lithuania	118	59	50.3%	0.54%	15.2
Macedonia	n.a.	n.a.	n.a.	n.a.	n.a.
Poland	1 775	957	53.9%	0.70%	25.9
Romania	250	176	70.7%	0.55%	7.9
Russia	2 542	1 959	77.1%	1.09%	13.4
Slovakia	175	79	45.3%	0.47%	14.6
Slovenia	207	115	55.5%	0.62%	62.3
Turkey*	880	340	38.6%	0.17%	5.4
Ukraine	228	163	58.6%	0.54%	6.4
Tot. Centr./Eastern Europe	7 709	4 694	60.9%	n.a.	12.3
Total Europe	97 061	40 831	42.1%	n.a.	53.0
Brazil	7 422	3 741	50.4%	0.65%	22.2
Israel	932	234	25.1%	0.34%	38.8
Japan	55 498	18 618	33.5%	0.38%	146.0
Mexico	7 500	4 524	60.3%	1.00%	45.7
South Africa	1 284	708	41.2%	0.40%	49.7
United States	212 832	49 862	23.4%	0.56%	180.1

Source: Local Institutes

*NET, **Data from 1998

European Television Overview

Key Analyses

Convergence: a Second Youth for Television

Driven by the fallen barriers between different technologies used, and due to the development of new services corresponding to new needs of the consumer in the post industrial economies, we are experiencing the merger of three important sectors that until now did not combine their strengths: the telecommunication, the audio-visual and the information technology business.

The best illustration of what the convergence of technologies within concentrated groups would look like is the merger between the Internet access provider America On Line (AOL) and the content producer and content broadcaster Time Warner. Through a simple click, 22 million subscribers of AOL will very soon be able to surf on the Internet while watching the TV programmes of the Time Warner group, or download music from the EMI collection on an MP3 format, or whilst they look up the major topics that appeared in magazines such as Time or Sports Illustrated, or while leafing through the library of movies owned by the group, etc...

The ever returning question in the debate concerning the convergence of technologies is: "Will the computer, or more precisely the Internet, replace the television or on the contrary, will the consumer interact with the Internet through his television?"

TV through the Internet

Today, both alternatives exist. Broadcast.com from YAHOO, AT-TV from US West, Web TV from Microsoft, NCI from Oracle, Net Channel from AOL or Canal Web from Canal+ are some of the existing hybrid examples of cybercasting or webcasting. Due to limited bandwidth on the Internet, one of the major characteristics of all these formats is that they emphasise content more than quality of the images broadcast. A second characteristic they all have in common, is that they all offer a maximum of interactivity. The programme types offered can be described as being hyper-thematic and pointcasted. Examples of formats are: chess, opera, hip hop, bridge, financial news

According to Forrester Research, the target group that watches Web TV has a very specific profile. They are young, between 14 and 25 years old; they follow the latest trends in Internet and more particular the trends in the music business; they purchase goods regularly on the Internet. This international target group of e-viewers

have switched from TV to the Internet because they are frustrated by the content of broadcast TV. They prefer much more personalised content, which they can find not only on the web TV sites, but also through specialised Internet sites in general and especially in chat and discussion groups.

But even with the latest technological improvements in bandwidth capacity, Web TV remains a low quality product for a very small market. The economical perspectives of these attempts are therefore rather pessimistic.*

Or the Internet through television sets?

According to Rémy Le Champion and Benoît Danard, there were approximately 1.05 billion TV sets worldwide in 1997**. In the same year, the number of personal computers on a world-wide scale was 250 million. This shows that the TV-set still has a huge advantage on the PC in the battle for the world-wide and global consumers that the Internet content providers are looking for.

The digital revolution in television broadcasting technology has not only led to an increase of capacity, i.e. an increase in the number of TV-channels offered to the consumer. It has also broadened the functionality of a mass medium we used to consider as a passive waste of time. In those countries where digital platforms have already entered the consumer market, convergence between TV broadcasting and functionality services is already available for a critical mass of end-users. In the United Kingdom, for example, subscribers on certain digital platforms do not only have a variety of broad- and narrowcast TV-channels; they can also have access to interactive programmes, the internet through the TV set or even functions that enable them to receive certain services linked to the digital platform on their WAP mobile phone.

According to a survey from the OFTEL***, the regulatory organisation of telecommunications in the United Kingdom, one fifth of British households already subscribe to digital TV. 20% of these subscribers already use the interactive possibilities offered such as retail shopping, getting on the internet through the digital platform, etc. But what kind of services will attract the subscribers of digital platforms? The answer can be found in the different categories already discovered in the existing interactive TV-groups: information, transactions, leisure and other interactive services.

Some perfect examples of additional services offered through the Internet by the digital platforms are to be found on BBC-online in Britain or on Open TV from TPS. In the information section, news about the weather report, the highlights of the TV news or the TV programmes for the days to come can be packaged for online usage.

In the transaction part, they can offer e-banking, financial information about the stock exchange, real estate offers etc. In the leisure part, they could offer online video games, pay per view channels. And last but not least the major part of the development in interactive applications available through TV sets includes games, personalised narrowcast information about your favourite sports or hobbies. But the interactive part that will have the fastest development will be the e-commerce.

A perfect example of what the e-commerce application in the convergence between TV and the Internet will be is the start-up "AsSeenIn.com". On this website, people can look up their favourite TV series and order, for example, the jacket, shoes or even the car that their idol had.

At the beginning of this new millennium, the chances are real that an average western household will be able to receive a few hundred TV channels, broadcasters, narrowcasters and some nearly individual or individualised TV programmes. Chances are also very great that interactive services will be developed through these digital platforms and that the TV set or one of the TV sets in the home will not just be used for passive leisure.

*Télévision de pénurie, télévision d'abondance by Rémy Le Champion and Benoît Danard, Editions: La Documentation Française, Paris, 2000, page 206.

** Télévision de pénurie, télévision d'abondance by Rémy Le Champion and Benoît Danard, Editions: La Documentation Française, Paris, 2000, page 170.

*** Source: La Libre Belgique 18/08/2000, page 22.

The Resurrection of Mass Marketing

Mass marketing is dead, according to marketing gurus in the late 1990s. In the new millennium, 1-to-1 is the paradigm of the business, so they say. The internet is the medium promising to support this approach. Meanwhile, a soft but gradual shift has accrued. Web-based firms in particular furthered the old schemes of mass-marketing, wooing new users.

The history of mass marketing

Bringing mass goods to a disperse clientele is an idea that was born a long time before the industrial age. From ancient potteries to 18th century weaving mills, there has always been production en masse. But branding mass goods in a premeditated and sound way and delivering them to mass consumers is an idea born first in the last century.

Mass production followed mass destruction: particularly during the period after the second world war, standardised, mass-produced products hit the shelves of the retailers and the other distribution channels. They were bought by a mass of consumers – lacking profile – in the United States, and in a rebuilt Western Europe. And of course, it was more the product profile than the consumer profile that was absent. Marketing theory used the 4 P's-formula – product, price, place and promotion – taking the first P for given, supported the top-down approach to consumers: it is not what the consumer needs that is important, but rather what the company is good at producing. Advertising has to promote what is produced through the mass media to a disperse mass audience. “This programme is interrupted for an important announcement from our sponsor” was heard on radio, and was introduced to television. David Ogilvy's bonmot can be read as a reproach to this kind of advertising: “The consumer isn't a moron; she is your wife. You insult her intelligence if you assume that a mere slogan and a few vapid adjectives will persuade her to buy anything.”

Mass markets in the 1950s

From war production to the peace economy with its baby-booming 1950s, there was one medium showing a way to cater for the masses: Television. It was the vehicle to push products from factory-belts to the consumers. Before the expression was even created, in the 1950s, push marketing was what marketing was all about.

But during the roaring fifties, the first generation gap emerged. A new tonality could be felt in the popular culture of the young, in the way the younger generation dressed like James Dean and listened to Rock ‘n’ Roll music in the US, or dressed in black as in existentialist Paris. Suddenly there were consumers with different faces, different voices and values. The entertainment

industry was among the first to cater for them. Harvard University's Theodore Levitt indicated the short-sightedness of 1950s marketing in his famous article: “There's no such thing as a growth industry. There are only consumer needs, which might shift at any time.” But it still took quite some time, until the new approach found its way into the fundamental thoughts and books of marketing.

“That Seventies”

There had to be another generation gap, to show marketers the needs and advantages of positioning, producing for distinct target-groups, and seeing the world through the consumers' eyes. In the late sixties, when the first baby-boomers attained full age, when British pop culture had conquered the New World, and protest against the Vietnam war culminated, the generation gap widened and subcultures came into being. Alvin Toffler was the one to create the slogan of “demassification”, while Al Ries and Jack Trout wrote a series of articles on “The Positioning Era” for “Industrial Marketing”, “Advertising Age” and the “Wall Street Journal” in the early 1970s. Copies of the series were distributed in pamphlets, and the book that followed, “Positioning, the Battle for your Mind”, was a big seller. Written still from the “hypodermic needle” point of view, Ries and Trout bring the consumer's mind into focus: “Advertisers and agencies don't position products, consumers do”.

The baby-booming generation gradually became more self-assured and self-confident. Consumer advice centres flourished, independent information about products was increasingly demanded and discussed in magazines and on television. And in turn, consumers gradually came to be seen not as distinct targets for products, services, and advertising, but as active participants in a process of choice and selection.

The downside to this was demassification, or in a language closer to our century: individualisation of customers and fragmentation of brands. The more niches served, the lesser the magazine circulation, and with more cable channels available to the average home, the network ratings slowly but gradually began to decline. The upside: the new media vehicles provided a further directed contact to advertisers' clientele. With profiling, positioning and targeting techniques, not only did the target groups for products and promotions crumble, but with it, the brands and the media vehicles of advertising.

New tools and techniques

In the 1970s and, increasingly, during the 1980s, computer-power made its way to the marketing front-desks. Consumer segmentation seemed to help find and exploit niches in the product-portfolio, in the pricing, or

the channels through which the branded products were distributed. What catalogue sales houses had started, profiling individual clients' purchases, grew into large businesses: marketers' databases were able to seek out and pursue not only target groups, but individual households.

And advertising embraced these new tools and techniques of nano-targeting: freecall telephone-lines appeared on ever more television-spots, giving potential customers a means of feedback and ordering either information or the products instantly. Doing this, obviously increasing the information within the company databases.

Mass Marketing: Still an Answer

Of course, there have always been and will always be goods that cater for the masses. Fast moving consumer goods, which are purchased rather frequently, have a relatively low price and are likely to be bought on impulse, with no vital decision to be taken. Although they approach their customer-targets more multi-faceted since the 1950s, still use the big media-vehicles with noticeable accomplishment.

One of the big factors driving the success or failure of 1-to-1 businesses is the cost of new potential customers. For some enterprises, the costs of 1-to-1 promotion did explode. There is a constant need for integrated approaches towards new leads, to keep marketing costs under control. And through this niche, mass marketing experiences a certain revival.

Globalisation and global brand-building are another factor responsible for the renaissance of mass marketing: The harmonisation of brand names across the borders and continents, the promotion of services and goods worldwide is best done through the promotional vehicles of the most effective media. Thus, television has seen a resurgence especially in the large language-areas of the world.

And finally, company mergers and take-overs have, all of a sudden, created a demand for differentiation: Especially in the service sector, with banks and financial service providers, in the telecommunications industry and in related sectors, consumers want to be convinced as to what service is required to solve their problems.

New Challenges for Mass Marketing

Since the early 1970s, marketers everywhere in the Western World had to face a dramatic shift of powers: from the supplier to the consumer. Robert Lauterborn has changed the company-driven 4 P's to the 4 C's of modern marketing:

What once was the Product, is now seen as what the Customer needs and wants. What once was simply the Price is now comprising the total Cost to the customer. What in the past was the Place of purchase is now seen as the Convenience to the customer. And what in the past was pure promotion making public the producer's point of view now turns out to be a process of Communication.

Worn-out stimulus-response concepts of advertising and product promotion do not help in the 21st century. Therefore new, integrated concepts of marketing had to be discovered and applied.

The use of multi-step approaches towards customers was one way to inform about new offers: existing clients can be included to testify the superiority of a brand, when fed by direct-mail. Potential customers can be approached through the mass media.

Feedback channels are increasingly used. Free telephone lines or worldwide web addresses become part of the average television spot. This relationship approach in advertising has proved to be pretty successful when additional information is required before a service or a product is obtained.

New Solutions with Mass Marketing

Mass marketing is as vivid as ever before. But it is applied in less simple formulas than previously. Mass customisation has finally reached the marketing and advertising world. Mass communication is connected to individual customer retention programmes, taking into account that the best base for a business are existing clients. Fast feedback-channels are introduced to the mass marketing approaches: not only telephone and www-addresses are used to support indecisive leads, there is an increasing customisation of email feedback to inquiries.

And most of all: intelligent media solutions are requested to outvote the competition. Of course, heavy targeting is required to reach the most valuable customers through the mass media. Crossmedia-approaches including direct response elements are applied to open up the eyes and ears of the client base.

And it turns out that quantitative data on the audience of media is quite a commodity in the planning process. The qualification of the media-audience according to the marketers' needs are of utmost importance. The resurrection of mass marketing shows that the downside of fragmentation includes the advantage of an audience of individuals.

What's New on Screen in Europe?

The revival of games shows

When US network ABC broadcast the show “Who wants to be a millionaire” they didn’t expect such a success. The show has secured number 1 position in ratings and helped ABC to become the leading US TV channel. Indeed, the network reported the highest audience figures.

“Who wants to be a Millionaire?” has proved to be the most successful British quiz show of all time. The show has been licensed or optioned in 77 countries. Since 60’s the quiz show has declined but it is very much back in vogue. It is becoming a challenge to secure a large audience in a fragmenting environment. With the success of “Who wants to be a millionaire” quiz games have flourished in prime time like Greed (USA, Fox), Twenty One (USA, Germany), ...

WHO WANTS TO BE A MILLIONAIRE?		
Country	rating (in million)	Share*
UK	19.4	68.0%
AUSTRALIA	1.0	31.9%
BELGIUM	n.a.	42.9%
DENMARK	n.a.	50.0%**
FINLAND	0.56	33.0%
GERMANY	7.6	35.0%
GREECE	n.a.	23.2%
ITALY	5.0	35.0%
US	31.99	32.0%
NORWAY	1.5	80.5%
RUSSIA/UKRAINE	13.74	37.4%
SPAIN	3.31	31.3%

Source: Celador productions, Endemol Entertainment, M&M Europe
* highest rating unless otherwise specified, ** average values 1999/2000

Reality TV

Although MTV broadcast the first episode of “The Real World” many years ago, the reality-soap concept made a big leap with the introduction of “Big Brother” in the Netherlands. “Big Brother” is a unique interactive TV and internet real life soap opera in which 10 to 12 strangers are isolated in a specially designed house for 100 days with their every movement being monitored by 24 cameras and 60 microphones. The show mixes a dose of voyeurism with the thrill of game show (contestants are voted out of the house every ten days). The success of this program both in Holland as well in many other countries has demonstrated the power of soaps showing the real life of ordinary people. The show was originally launched in the Netherlands in September 1999 and was an instant success. On average, the series reached nearly 30% of Dutch viewers and the web site generated a total

of 52 million page view. This program has been licensed for other major markets: Germany, Spain, United Kingdom, North Belgium, Scandinavian countries, Switzerland... . In September 2000, the second edition of Big Brother will start in Germany on RTL and in RTL2 and in the Netherlands in RTL4. In North Belgium, this reality show will be broadcast for the first time on Kanaal 2.

BIG BROTHER		
Country	rating (in million)	Share*
GERMANY	1.75**	26.3%
HOLLAND	6.9**	26.1%
SPAIN	9.9	54.3%

Source: Celador productions, Endemol Entertainment, M&M Europe
* highest rating unless otherwise specified, ** average values 1999/2000

This new programme proves the tendency towards more and more reality on television. This trend has been visible especially since 1999 in many different formats. These shows often include games elements to increase the “dramatic surrounding”. Other Real-life/game show have flooded the European screens like “Operation Robinson” which follows a group of contestants isolated on tropical island ‘De Bus’ showing the life of people living in a bus for four months in Netherlands and “De Mole” in Belgium are other popular programmes in the same vein that Big Brother.

Also in the „fiction“ soap series the trend is to deal more with ‘normal’ lives rather than with the glamour life of the heroes of long established soaps like “The Bold And The Beautiful”. Most domestic soap series portray regular people living ‘normal’ lives. In Germany, for instance, “Gute Zeiten, schlechte Zeiten”, product of RTL, shows the life of several families in Cologne, but also “Saint Tropez” in France which shows the life of 3 young women.

A step further in the concept of “reality” was the inclusion in programmes of some material filmed by people themselves (instead of the production team). An example of this is ‘Geld Voor Je Leven’ (Money For Your Live) broadcast both in Germany and The Netherlands. People got a small camera and were asked to film their daily lives. If interesting enough pieces of these films were shown on television every evening. The viewers in their turn were allowed to vote for their favourite films and by that decided what was going to be on TV the next day. In this perspective some people predicted that the consumer him – or herself would be the TV-producers of the future. This seems doubtful given the fact that this concept was not a big success both in Holland and Germany. Nevertheless this concept of “viewer-tv producer” can have some future on internet.

European formats on American TV

British quiz show “Who wants to be a millionaire” has been a surprise success on the American network ABC in Prime time when it started in August 1999. Since then the show has become a recurrent series and is currently the highest viewed regular programme on American television. Following this success, US networks have been keen to try to duplicate this success and have intensively sought to acquire the rights of successful European Reality/Game shows. After a bidding war, CBS walked away with the Big Brother rights and started broadcasting it during Summer 2000. CBS also weekly broadcast “Survivor” based on “Robinson Expedition”, another European real life game format. Survivor is a tremendous success, being the top rated series on American television during the Summer 2000. The first 6 episodes averaged 23 million viewers each. ABC acquired “the Mole” and NBC signed for “Chains of Love” another Dutch Game/Reality format to be broadcast during the 2000–2001 season.

The European fiction production continues to increase

In a general trend, the European fiction output has increased every year and the new products broadcast in the top 5 markets (Germany, United Kingdom, France and Italy) rose to 5 193 hours in 1999. The most dynamic market was Italy where domestic production enjoyed a renaissance growing 42% in 1999 to 504 hours. Italian networks which used to broadcast only prestige Italian drama with a maximum of 8 episodes have now multiplied long running series such as the popular local version of Medica di Famiglia (originated from Spain). Germany remained at the top place and the UK followed with 1324 hours of fiction production in 1999. Situation in France is less rosy. French produced fiction grew a weak 7% in 1999 to 665 hours.

NEW DOMESTIC FICTION OUTPUT IN EUROPE 1996-1999					
Country	1996	1997	1998	1999	1999/96
GERMANY	1 690	1 815	1 945	1 828	15%
UK	1 050	1 223	1 321	1 324	26%
SPAIN	459	759	851	872	85%
FRANCE	691	576	621	665	-10%
ITALY	221	397	357	504	62%
5 MARKETS	4 111	4 770	5 095	5 193	24%

Source: Eurofiction/TV International

Considerate as the motor of the audio-visual industry, the local German fiction increased as an important way, reached about 2000 hours in 1999. While the US remains the main source of new series in Europe (Such as Ally Mc Beal, Sex in the City, the Pretender ...), the most striking change was the growth of programming from outside the US especially from Germany. M6 aired successfully the RTL series “Der Clown” in prime time. As well as “Der Clown”, the RTL network has placed drama series like “Alarm fur Cobra” and “Medicopter” in several European territories. On his side, the Kirsch group has sold its police dog series “Kommissar Rex” widely. Public broadcaster ZDF hoped to repeat the success of Derrick with its new police series “Siska”. “Siska” has been sold to 36 countries including France, Italy, Netherlands, Hungary and the Czech Republic, but also “Murder Squad” to Italy and “Air Rescue Team” to France and the Czech Republics.

New trends have been noticed in the European fiction production. Firstly, cheaper products, such as soap operas, have largely fuelled the market growth. For instance the Italian commercial broadcaster Mediaset has introduced its first soap “Vivere”.

Secondly, the format of the series became longer, the number of episodes has grown by 30% in 3 years (from 1996 to 1999) against only 10% of increase in the number of titles. In the UK, for instance, the average number of episodes per title has increased from 9.2 to 11, in Italy from 6 to 11.2 and in France from 3 to 4.7. In Germany, the popular sitcom “Ritas Welt”, product of RTL, will probably screen 16 new episodes during the next season and the number will maybe rise to 22 in 2001. Until now long running series were one of the main strength of the American productions.

In the whole fiction genre, the production of series and serials has increased since 1996 and its share reached about 56% in 1999, mainly due to the 30 minutes production. This format represented, indeed, 63% of all broadcasts in 1999 in the top 5 markets.

If the number of domestic productions is increasing this has a contrary effect on European co-productions. In 1999, there were only 141 new co-produced titles in the fiction category compared to 180 titles in 1998. Co-productions mainly concerned prestige mini-series like “The count of Monte-Cristo” and “Les Miserables” co-produced by France’s TF1, Italy’s Mediaset and Germany’s Taurus film.

No big competition, smaller sport on screen

There were no international sport event in Europe in 1999, as Olympic Games or big football competition. As an effect, smaller sports have tapped the ratings alongside the usual audience's favourite like the Champion's League (football). Minor sports on top in 1999 included Cycle Racing in Belgium, Ski jumping in Germany, World Cup Rugby in France and darts in the Netherlands.

Another trend has been largely noticed, in several countries is the increasing success of the Formula 1. Formula 1 is growing in especially among the target group male 20-49 AB1 (high social class) which is a very popular target group for advertisers, especially dot.com and telecom-industry.

2000 will be a year of sports with Euro 2000 (football) and to a lesser extent Sydney Olympic Games. The final of Euro 2000 in July 2000 between France and Italy has broken all time audience records in France. The finale match between France-Italy gathered 21 million of viewers, a 78% of audience share.

A few "events" also gathered sizeable audience in Europe. Long expected Millennium Night, the old "Eurovision Song Contests", the August Eclipse succeeded to attract viewers. „Event documentaries“ also rolled out in Europe like the BBC series „Walking with the Dinosaurs“.

Some other "news event" had strong local impact like the marriage of the King's son in Belgium, electoral campaigns in Austria and in Switzerland and several national beauty pageant contests.

The era of interactivity

One other big change is the growing interactivity, of which it is needless to say that the future combination of TV and internet brings almost unlimited possibilities.

Big Brother again is the best example: while on television one could see an edited short version of the last 24 hours, on the internet it was possible to follow everything live 24 hours a day. Furthermore there was a lot of additional information and content on the site.

For the future it is clear that the interactivity will grow, more and more programs already have an internet site with additional information. There is some doubt though about the amount interactivity viewers want. Research from BBC television in the U.K. for instance showed that television-viewers don't want pages designed like the current internet pages (blurred because of many buttons and click-through possibilities) but rather pages that are a bit more 'quiet'. It is clear that interactivity will be an important aspect of future television, but it doesn't seem clear yet how much interactivity it will contain.

Children's Programming – History and Trends

From sketches dedicated to a young audience to the packaged license and merchandising deals

In 1947, NBC introduced Howdy Doody and Buffalo Bob Smith, the first programme sketches dedicated to a young television audience. The show ran every weekday at 5:30 p.m. until 1960, influencing the vocabulary of the first American TV-generations. CBS launched Captain Kangaroo in 1955 and started a new genre in children television: the children's show.

It is only from the mid-sixties onwards, that children programming began dominating the network schedules on Saturday and Sunday morning in the States. These time slots were filled with children's shows and cartoon programming. The entire American children TV programming until the late sixties was made up of programme contexts that were meant not only to attract children, but also to create a perfect context for advertisers targeting children.

By the end of the sixties, in 1969, Joan Ganz Cooney launched The Children's Television Workshop and its world renowned Sesame Street. The plan was to create quality educational programming as a reaction to the over-commercialised network children contexts.

The next important decade for children programming was the 1980's. With the start of Nickelodeon and the Disney Channel, programme schedules of a TV channel were focused entirely and exclusively on children contexts. Children's programming became a TV format broadcast 24 hours a day. Marketing and promotional efforts increased and the production houses were not only commercialising children's programmes as such, but also extended contracts to licensing and merchandising.

Today, this trend is ever increasing and one can even say that without the marketing, merchandising and licensing efforts of the producers, many children programmes would not even be profitable any more.

The late 1990's showed an increase in production of TV content and, in spite of the several waves of concen-

tration, more and more production companies offered programmes aimed at children. The trend started about 10 years ago in the States. The main reasons are that due to the exploding number of new TV channels and digitisation of production, TV products are getting cheaper whilst the market is expanding. Programmes, especially children's programmes are being sold more and more frequently in a total package of licensing and merchandising that serve to make the products profitable.

Glocalisation and concentration between content and content broadcasters

According to the fiction buyers we interviewed, there are two major trends in the audiovisual production and broadcasting in general. The first is linked to technological revolutions and the introduction of digitised animation. It is the glocalisation, a trend to industrialise the production process of animated films. Scenarios are invented in one place, whilst the production of the animated films are outsourced to Third World countries. The second trend is the merger between content providers and content broadcasters: e. g. Saban and Fox Kids or Comedy Central. But, in spite of the continuous concentration, there is an explosion of content providers for children programming.

Splitting up the children target group into sub-targets

Children are not considered to be one single target group any more by production houses. They are offering animation segmented towards boys (Pokemon) or girls. They even target new sub-groups such as the children aged less than 4 years (Teletubbies, Jellabies).

And last but not least, they are aware of the fact that the majority of children's programmes are watched by kids and at least one of both parents. They also produce, therefore, more and more animation with different layers of comprehension, such as the Simpsons. This enables different target groups to enjoy the same programme, but with a different degree of comprehension.

TV Advertising Restrictions in Europe

TV is certainly the most affected media by advertising restrictions or bans. The main reason of this is probably the undeniable power of TV largely demonstrated in terms of audience reach in this “TV Key Facts 2000”. On the other hand, TV is also the most appropriate media to create emotions, to build image, briefly, to influence the consumer in its purchase decision. But still, even for TV advertising, the most important question remains: Is advertising creating a non-existing need? Can a TV spot lead one person to smoke or to consume alcohol?

Most of the recent regulatory efforts, on a national or european level, are made in the aim to protect Public Health. This would mean that, through restrictions or bans, the consumption volume of different products, as alcohol, tobacco or medicaments could be reduced. Unfortunately, the experience has shown that in saturate markets for example, like the beer market in some european countries, advertising doesn’t have an impact on total consumption, but simply on the market shares of the competitors. There is no proof of relation between volume of advertising and volume of consumption of a product category.

Nevertheless, in saturated markets no legally produced and distributed product has a chance to survive without commercial communication using mass media. Advertising is the most effective marketing tool in a market economy based on competition. Restrictions clearly reduce competition possibilities, can block the existing market shares and may close the market for arriving brands and products. The consequence can be industrial concentration for one product group, followed by price increases and finally a reduced offer to the consumer. Advertising is an important and indispensable part of commercial activity, also for consumers.

The most negative impact of advertising restrictions in TV will certainly be felt by the media itself. Commercial free TV cannot exist without advertising incomes. A general ban of any product advertising will immediately reverberate on viability of commercial free TV channels. In german TV, advertising for alcoholic products was representing 5% of the gross turnover in 1999. Considering this, it is understandable that restrictions can also have negative incidents on programme quality. If TV stations are obliged to reduce costs, they will probably start on the programme side. For that reason, advertising restrictions, if they affect quality and diversity of TV contents, can also be a threat for opinion plurality and for democracy in general.

Children’s advertising

Since Greece has banned TV advertising for toys and Sweden has prohibited sponsorship of programmes and advertising aimed at children under the age of 12 on terrestrial channels, regulation of commercial communications to children is largely discussed on a European level. Denmark is intending to introduce the swedish model, Norway already

prohibits all TV advertising aimed at children, Greece is continuing to plan further restrictions, Ireland has banned all TV advertising from Monday to Friday between 14.00 and 15.00 and Flanders prohibits TV advertising 5 minutes before, during, and 5 minutes after children’s programmes.

The european consumers group BEUC calls for a general ban of TV advertising aimed at children. For the BEUC, “children and advertising must be seen as question of ethics and morality...”. It is a fact that children are the less experienced TV consumers and have to learn how to use the media and how to manage advertising. This learning process is not possible when advertising is prohibited, but goes together with responsible behaviour of the advertising and media industry. The content and the form of any commercial communication dedicated to children is highly important. A good model for other european countries could be the german Self-regulation system. These guidelines prohibit any form of misleading advertising taking advantage of the unexperienced and credulous young audience. For example, one rule foresees that children cannot be incited to purchase through TV advertising. Both media and advertising industry supervise the respect of the guidelines and control the content of each commercial communication aimed at children.

Alcohol

As for tobacco, the european committee of the WHO is demanding a general ban for advertising of alcoholic beverages before end of 2005. This declaration foresees restriction of advertising to simple product information in print media and a total ban from TV and radio, as well as from sports events. The European Commission is also planning to restrict advertising for alcoholic products around programme segments dedicated to children and young people. In Norway, Sweden and Finland, spirits and beers are already banned from TV. In the UK, the Netherlands, Spain and Portugal, restrictions concern the content and the style of TV advertising for alcohol.

If tendency goes to more regulation in this sector, recent experience has shown that advertising bans are perhaps not the appropriate measure to prevent alcoholism and to reduce the consumption of alcoholic products. Official statistics in Finland, one of the three scandinavian countries that introduced total bans in the late seventies, show that the average consumption has grown from 4.7 liters per habitant in 1977 to 7.5 liters in 1997.

Self-regulation can be seen as a real alternative to strict regulatory framework and is already effective in most of the countries in Europe. According to the EASA (European Advertising Standards Alliance), “Advertising self-regulation has a proven track-record in many countries, due to its speed and flexibility and to the fact that it can rely on the support of all three constituent parts of the advertising industry - advertisers, agencies and media”.

Country by Country

Western Europe

Austria

About 49 regional and local commercial TV-channels already broadcast their programmes via cable (or via satellite) in different parts of the country. The biggest commercial-TV-channel is ATV, the former “city-channel” Wien 1. ATV was launched on January 17th 2000 and broadcasts via cable and digital satellite 24 hours/day. ATV claims to reach approximately one million cable-households throughout the country. Its main target-group are young people.

Commercial national television in Austria has not yet begun. However, it is expected that at some point in the future, Austrian legislation will allow commercial national TV stations.

Since 1997, ORF, with its tourism and weather channel TW1, is receivable via digital-satellite ASTRA 1G. A mixed programme (ORF2 and TW1) is receivable in the digital bouquet of the German broadcaster ZDF. And since May 8th 2000 TW1 broadcasts 4 hours or more per week during prime-time.

As in most other European countries, digital TV is an important issue in Austria. ORF decided to start broadcasting its TV channels ORF1 and ORF2 via digital satellite (ASTRA 1G) as of summer 2000 as a first step in the move from analogue to digital TV broadcasts. Due to economic and legal reasons ORF will have to decode these programmes. Their reception will be possible with the Leo Kirch set-top-box (d-box) and a special smart card, which will also enable the reception of Premiere World for those who should wish to subscribe to this pay-TV package.

In addition to its existing TV channels, ORF is planning two new thematic channels: a cultural channel and a sports channel.

Right now, there are five German channels RTL, RTL 2 (sales: IPA Plus), SAT.1 (CineCom), PRO7 and Kabel 1 (MGA), which feed „Austrian advertising windows“, i.e. commercial breaks designed specially for Austrian customers, into some of the regional and local cable networks.

As regards Pay-TV, there have been a number of changes in Austria, since the German channels DF 1 and Premiere merged into Premiere World on October 1st 1999. But due to the relatively high offer of German speaking Free-TV channels and also the high costs of the necessary equipment, they have not managed to win significant market-shares so far. By the end of 1999, Premiere World reached the number of 110 000 subscribers, of which 51 700 have a digital and 58 300 an analogue set-top-box. The biggest cable-provider in Austria, Telekabel, also has a separate pay-TV-service, Telekino (part of UPC), which is actually the only Austrian company. It has not won very many subscribers so far, as the German competitor is comparably strong in this field.

There have also been major improvements in the field of the internet. The PC-penetration in Austria is 51%.

39% (age basis 14+) have general access to the internet (either office, school, university or at home) and 22% have access at home. The official web-site of ORF, ORF-ON, is the most frequently visited web-site in Austria.

By the end of 1999, 75.9% of all Austrian TV-households could receive an average of about 35 different foreign programmes (most of them in German language) via cable or satellite-dish. The ORF has lost slightly on its market share in cable/satellite-households (48.1% in 1999 in comparison to 49.8% in 1998). Viewing time has gone up from 146 minutes/day in 1998 to 147 minutes/day in 1999.

Since the 1995-programme relaunch of ORF-TV the process has continued ever since. In May 1999 ORF launched a bi-weekly foreign affairs magazine; reporting in the fields of economy, culture and science is being intensified as well as the focus on Austria in all fields of interest. Tri-medial elements are becoming very important, e.g. “Österreich-Gespräch” – screen events on political issues offering a synergy of studio-talk (with guests), an internet-platform (on ORF-ON) and radio-reporting.

As of June 1st, 2000 the ORF is due to open a window named “Alpha Österreich” on the Bavarian channel „BR-alpha“.

The total advertising expenditure amounted to 23.61 billion ATS in 1999. This value is about 7,1 % higher than the figure in 1998 and the highest value ever reached in Austria. Television advertising expenditure grew from 1998 to 1999 by 19.6% and amounted to ATS 5.85 billion.

The expenditure in the advertising windows (RTL, RTL II, SAT.1, Pro 7 and Kabel 1) grew from 1998 to 1999 by 86% and amounted to ATS 0,52 billion.The ORF TV CPT in 1999 was ATS 212.– (1998: 197.–), the TV CPT of ORF and the advertising windows ATS 176.– (12+).

According to a broadcasting law passed in 1993, ORF raised its advertising-time from 30 to 35 minutes per day on each channel on January 1st 1999 (and will raise it from 35 to 42 minutes per day and channel on January 1st 2001).

Austria

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General Data

COUNTRY	
Land area (km ²)	83 858
Total population	8 094 000 ¹
Number of households	3 182 000 ²
Average household size	2.5
In % of households/population equipped	
Phone	94.4 ⁴
Mobile telephone subscribers	60.5 ² /49.3 ²
PC's	49.0 ³ /n.a.
Internet access	n.a./16.0 ³
Internet users (age 14+)	n.a./28.0 ³

ECONOMICS	
GDP in billion ATS (at current prices)	2 705 ⁵
GDP per capita in ATS (at current prices)	323 200 ¹
Inflation rate in 1999 (in %)	0.4
Value of ATS in Euro (EUR)*	1 EUR = 13.76 ATS
Value of ATS in US-Dollar (USD)*	1 USD = 13.65 ATS

Sources: ¹ ÖSTAT 1999, ² Radiotest 4. Qu. 99, ³ AIM 1999 (4. Quartal), ⁴ MA 99, ⁵ ÖSTAT 1. Qu. 2000, *December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	3 036 000 ¹
In % of all households	98.0
Numbers of channels received by 70% of the population	33
TV License-Fee cost per year	ATS 3 008.–/EUR 218.60

TV EQUIPMENT	
	in % of TVHH
Colour TV	98.2 ¹
Multiset (homes with more than 1 TV set)	52.0 ¹
VCR	71.5 ¹
Teletext	70.8 ¹
Remote control	n.a.

Sources: ¹ MA 99, ² Statistical Yearbook 2000 of European Audiovisual Observatory

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	54.0 ²
	connected	30.9 ¹
Satellite	private dish/DTH	38.7 ¹
	collective dish/SMATV	6.5 ¹
Terrestrial	analog	97.3
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	58 300	Digital TV subscribers	51 700

Sources: MA 99

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Salses H.
ORF 1	1955	T, C	96%	German	168	Generalist	L–F, Adv.	ORF-Enterpr.
ORF 2	1961	T, C, S	98%	German	168	Generalist	L–F, Adv.	ORF-Enterpr.
TW 1	1997	C, S	30%	German	168	Weather, Tourism	Adv.	In-house

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Salses H.
ATV*	2000	C, S	29%	German	168	Generalist**	Adv.	In-house

Sources: ORF, Fessel GfK; Teletest – Empfangssituation 19.10.99–17.01.00.

*before: Channel „Wien 1“; **with local news & info

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
3 SAT	Public	C, S	70%	German	Generalist	L–F
EUROSPORT	Private	S	56%	German	Sport	Adv.
ARTE	Public	C, S	47%	German/French	Cultural	L–F, Spon.
CNN	Private	C, S	51%	English	News	Adv.
EURONEWS	Private	C, S	24%	English/Spanish	News	Adv.
MTV	Private	C, S	40%	English	Music	Adv.
TNT & CARTOON NETWORK	Private	C, S	33%	English	Old Movies/Cartoons	Adv.
TRT	Public	C, S	15%	Turkish	Generalist	L–F, Adv.
TV5	Public	C, S	19%	French	Generalist	L–F, Spon.
NBC	Private	C, S	24%	English	News, Talk-Shows	Adv.
NICKELODEON	Private	C, S	8%	German	Children	Adv.
SKY NEWS	Private	C, S	12%	English	News	Adv.
BBC WORLD	Private	C, S	7%	English	News	Adv.

Sources: ORF, Fessel GfK; Teletest - Empfangssituation 19.10.99 - 17.01.00

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ARD	Public	T, C, S	76%	German	Generalist	L–F, Adv.
ZDF	Public	T, C, S	75%	German	Generalist	L–F, Adv.
RTL	Private	T, C, S	74%	German	Generalist	Adv.
SAT 1	Private	T, C, S	74%	German	Generalist	Adv.
PRO 7	Private	T, C, S	72%	German	Generalist	Adv.
RTL 2	Private	T, C, S	72%	German	Generalist	Adv.
VOX	Private	T, C, S	70%	German	Generalist	Adv.
KABEL 1	Private	T, C, S	65%	German	Entertainment	Adv.
DSF	Private	C, S	59%	German	Sports	Adv.
N-TV	Private	C, S	54%	German	News	Adv.
VIVA	Private	C, S	26%	German	Music	Adv.
RAI UNO	Public	T, C, S	22%	Italian	Generalist	L–F, Adv.
RAI DUE	Public	T, C, S	4%	Italian	Generalist	L–F, Adv.
RAI TRE	Public	T, C, S	3%	Italian	Generalist	L–F, Adv.
SUPER RTL	Private	T, C, S	62%	German	Entertainment	Adv.
VIVA 2	Private	C, S	4%	German	Music	Adv.
TM3	Private	C, S	43%	German	Women	Adv.
H.O.T.	Private	C, S	10%	German	Tele-Shopping	Adv.
DER KINDERKANAL	Public	C, S	14%	German	Children	L–F
BR	Public	T, C, S	71%	German	Generalist	L–F
MDR	Public	T, C, S	62%	German	Generalist	L–F
SWR	Public	T, C, S	57%	German	Generalist	L–F
WDR	Public	T, C, S	60%	German	Generalist	L–F
Nord 3	Public	T, C, S	60%	German	Generalist	L–F
DRS	Public	T, C, S	27%	German	Generalist	L–F, Adv.

Sources: ORF, Fessel GfK; Teletest - Empfangssituation 19.10.99 - 17.01.00

PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Revenue	Sales H.
Premiere World ¹⁾	Okt 99	C, S	58 300	German	168	Movie, Sport, Family	Sub., Adv.	In-house
Premiere	1992*	C, S	80 000	German	168	Movie, Sport	Sub., Adv.	In-house

Sources: ¹⁾ Premiere Austria *(til 9/99)

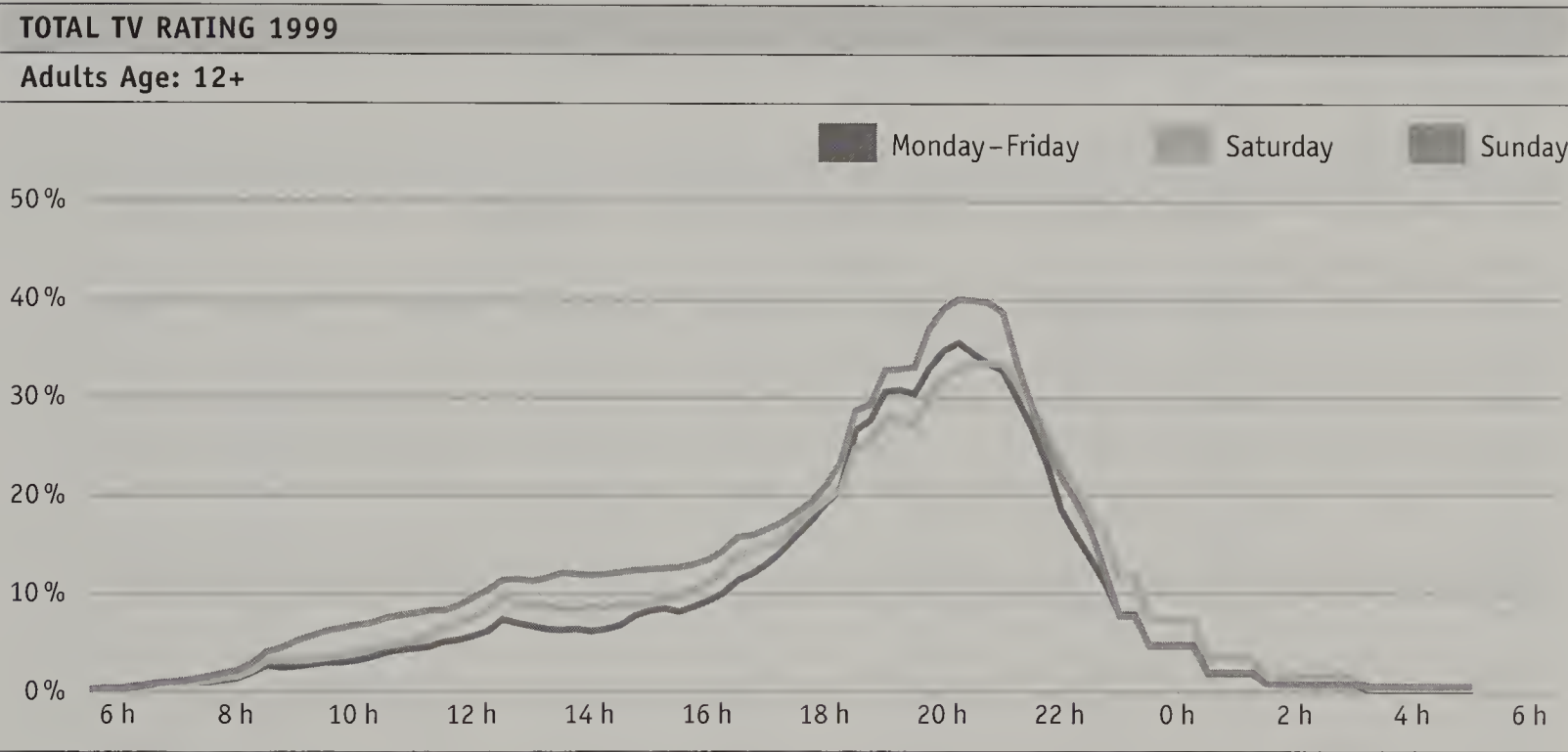
DIGITAL PACKAGES									
Channels	Launch	Diff.	Decoder	Subscr.	Language	No. of ch.	Revenue	Cost/month	Sales H.
Premiere World	Okt 99	C, S	n.a.	51 700	German	n.a.	Sub., Adv.	n.a.	In-house
DF 1*	Nov 96	S	n.a.	20 000**	German	ca. 30	Sub., Adv.	n.a.	n.a.

Sources: ORF, Fessel-GFK, Teletest 1999 *(till 9/99) **(2/98)

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	„Teletest“ - Fessel-GfK/ifes
Panel/Sampling Size	1 200 households
Instrument used (people-meter, telefon, face-to-face)	people meter
Population size in 000	
Individuals 3+	7 526
Adults 12+	6 699
Housewives 12+	540
Young Adults 12–49	4 233
Children 3–11	828

Sources: Teletest 1999; PC#TV

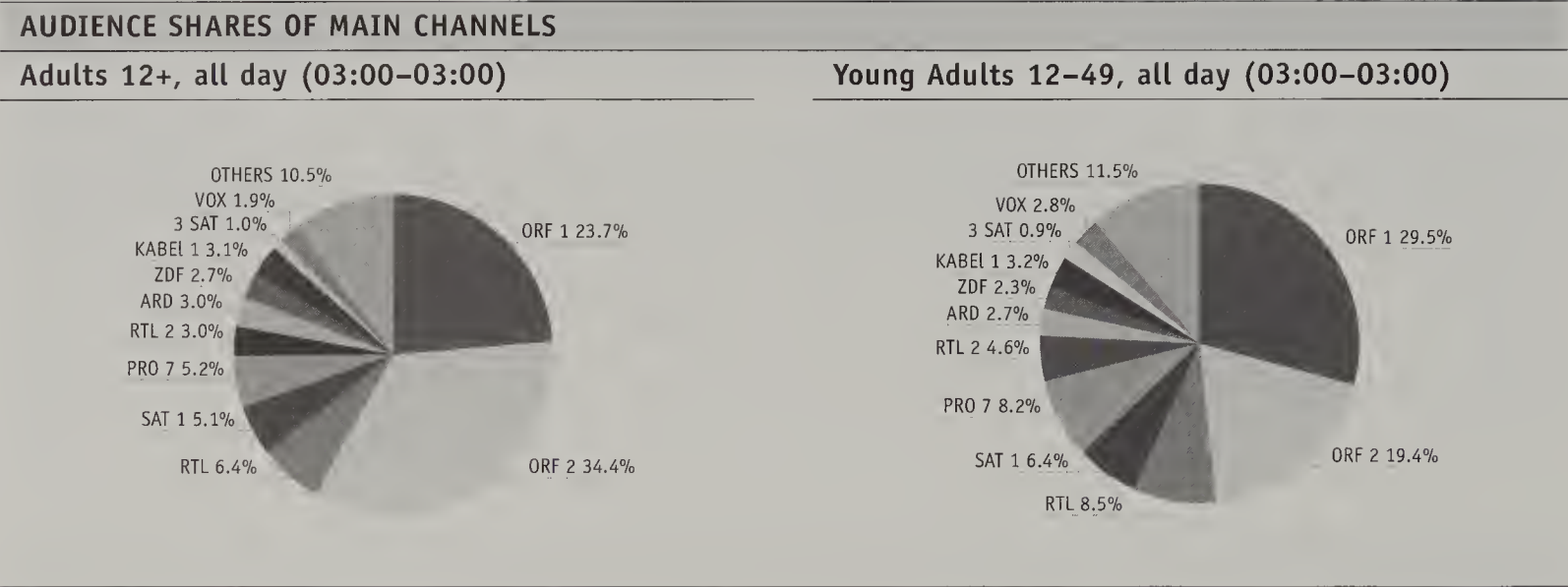


Sources: Annual Report 1999

DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 12+			Children 3–11			Young Adults 12–49			Housewives 12+		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	66.3	66.7	66.8	55.8	55.2	52.7	58.5	58.8	59.1	73.9	74.7	75.1
Viewing time per Viewer	212	217	218	127	129	128	183	187	190	202	205	206
Viewing time per Individual	142	146	147	72	72	69	108	111	113	150	154	156

Sources: Teletest 1999; PC#TV

Audience Shares



Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
ZEIT IM BILD 1	Aut	ORF 1/2	News	19:30	24/02	34.9%	84.9%
SKI DOWNHILL W. CHMP (W.)/REPORT		ORF 1	Sport	20:00	07/02	33.7%	69.4%
VILLACH'S CARNEVAL	Aut	ORF 1	Comedy	20:16	16/02	33.0%	74.5%
SKI DOWNHILL W. CHMP (W.)		ORF 1	Sport	18:55	07/02	32.0%	68.4%
SKI DOWNHILL W. CHMP (M.)		ORF 1	Sport	19:00	06/02	30.3%	68.2%
SKI DOWNH. W. CHMP (M.)/REPORT		ORF 1	Sport	19:44	06/02	28.8%	64.3%
SKI SUPER G W. CHMP (M.)		ORF 1	Sport	20:24	02/02	27.8%	60.3%
SKI SLALOM W. CHMP (M.)		ORF 1	Sport	21:30	14/02	26.9%	57.2%
FEDERAL STATE TODAY	Aut	ORF 2	News	18:58	25/02	26.5%	75.9%
ELECTIONS 99/RESULTS	Aut	ORF 2	News	19:00	03/10	26.2%	71.3%
SKI SUPER G W. CHMP (W.)	Aut	ORF 1	Sport	20:25	03/02	25.9%	56.8%
SKI W. CHMP (M.)	Aut	ORF 1	Sport	21:28	12/02	25.6%	58.5%
SKI COMBINATION SLALOM W. CHMP (M.)	Aut	ORF 1	Sport	21:24	09/02	25.5%	60.7%
JULIA. AN EXCEPTIONAL WOMAN	Aut/Ger	ORF 2	Series-Family	20:15	25/01	24.6%	57.9%
AUSTRIA TODAY	Aut	ORF 2	News	19:00	01/01	24.2%	65.7%
INCREDIBLY GOOD...	Aut	ORF 1	Comedy	20:25	06/02	24.1%	55.7%
SKI SLALOM W. CHMP (M.)	Aut	ORF 1	Sport	18:26	14/02	23.7%	66.7%
THE BULL OF TOELZ	Ger	ORF 1	Series-Family	20:25	07/02	23.7%	48.4%
SKI W. CHMP (W.)/STATEMENTS	Aut	ORF 1	Sport	21:29	03/02	23.3%	58.1%
SKI GIANT SLALOM W. CHMP (W.)	Aut	ORF 1	Sport	21:26	11/02	22.7%	49.7%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
ARCHE NOAH	USA	ORF 1	20:14	24/10	18.4%	42.7%
A HEART IS BECOMING YOUNG AGAIN	Aut	ORF 2	20:15	07/11	17.6%	41.5%
ALWAYS TROUBLE WITH NICOLE	Germany	ORF 2	20:15	20/01	17.3%	44.2%
BLOSSOM OF LIFE	Germany	ORF 2	20:15	12/12	17.1%	38.3%
THE BLUE CANNON	Aut	ORF 2	20:15	10/02	17.1%	41.5%
CLIFFS OF LOVE	Ger/Aut	ORF 2	20:14	19/09	16.1%	43.5%
THE GIRL OUT OF THE TART	Aut	ORF 1	20:14	01/10	16.0%	46.0%
MERRY-GO-ROUND OF LIFE	Germany	ORF 2	20:15	07/07	15.4%	45.2%
CRYSTALLIZED QUARTZ	Aut	ORF 2	21:18	08/12	15.4%	43.1%
THORNS IN THE VALLEY OF FLOWERS	Ger/Aut	ORF 2	20:16	10/03	15.0%	38.3%

TOP 10 SPORT EVENTS						
Title		Channel	Start. Time	Date	Audience	Share
SKI DOWNHILL W. CHMP (W.)/REPORT		ORF 1	20:00	07/02	33.7%	69.4%
SKI DOWNHILL W. CHMP (W.)		ORF 1	18:55	07/02	32.0%	68.4%
SKI DOWNHILL W. CHMP (M.)		ORF 1	19:00	06/02	30.3%	68.2%
SKI DOWNHIL W. CHMP (M.)/REPORT		ORF 1	19:44	06/02	28.8%	64.3%
SKI SUPER G W. CHMP (M.)		ORF 1	20:24	02/02	27.8%	60.3%
SKI SLALOM W. CHMP (M.)		ORF 1	21:30	14/02	26.9%	57.2%
SKI SUPER G W. CHMP (W.)		ORF 1	20:25	03/02	25.9%	56.8%
SKI RTL W. CHMP (M.)		ORF 1	21:28	12/02	25.6%	58.5%
SKI COMBINATION SLALOM W. CHMP (M.)		ORF 1	21:24	09/02	25.5%	60.7%
SKI SLALOM W. CHMP (M.)		ORF 1	18:26	14/02	23.7%	66.7%

Sources: Teletest 1999; PC#TV

Top Programmes Channel by Channel

ORF 1								
Top 10 Recurrent Programmes	Land	Genre	Date	Start.T.	Runs	Length (m.)	Aud.	Share
THE BULL OF TOELZ	Germany	Series–Crime	07/02	20:25	19	88	23.7%	48.4%
WANNA BET	Germany	Game Show	20/03	20:16	7	154	22.4%	59.8%
KAISERMUEHLEN BLUES	Austria	Series–General	14/02	20:13	36	45	22.2%	47.3%
KOMMISSAR REX	Germany	Series–Crime	11/02	20:14	14	46	18.9%	44.7%
MA 2412	Austria	Sitcom	14/02	21:01	10	24	18.2%	37.7%
UNIVERSUM	Austria	Documentary	11/11	20:16	91	58	16.7%	40.6%
CHAMPION		Game Show	27/02	20:16	5	105	15.9%	44.0%
HOPPALA		Reality Show	27/03	20:15	5	30	15.6%	43.3%
SPORTSNEWS	Austria	News–Sport	10/01	19:55	n.a.	12	15.0%	37.0%
SCENE OF CRIME	Germany	Series–Crime	17/01	20:14	30	90	14.9%	32.9%

Top 10 Single Programmes	Land	Genre	Date	Start.T.	Length (m.)	Aud.	Share
SKI DOWNH. W. CHMP (W.)/REPORT	Austria	Sport	07/02	20:00	10	33.7%	69.4%
VILLACH’S CARNEVAL		Comedy Show	16/02	20:16	121	33.0%	74.5%
SKI DOWNHILL W. CHMP (W.)		Sport	07/02	18:55	65	32.0%	68.4%
SKI DOWNHILL W. CHMP (M.)		Sport	06/02	19:00	44	30.3%	68.2%
SKI DOWNH. W. CHMP (M.)/REPORT		Sport	06/02	19:44	32	28.8%	64.3%
SKI SUPER G W. CHMP (M.)		Sport	02/02	20:24	70	27.8%	60.3%
SKI SLALOM W. CHMP (M.)		Sport	14/02	21:30	25	26.9%	57.2%
SKI SUPER G W. CHMP (W.)		Sport	03/02	20:25	63	25.9%	56.8%
SKI W. CHMP (M.)		Sport	12/02	21:28	27	25.6%	58.5%
SKI COMB. SLALOM W. CHMP (M.)		Sport	09/02	21:24	31	25.5%	60.7%

Sources: Teletest 99; PC#TV

ORF 2								
Top 10 Recurrent Programmes	Land	Genre	Date	Start.T.	Runs	Length (m.)	Aud.	Share
FEDERAL STATE TODAY	Austria	Regional News	25/02	18:58	281	23	26.5%	75.9%
JULIA. AN EXCEPTIONAL WOMAN	Austria	Series–Family	25/01	20:15	13	48	24.6%	57.9%
AUSTRIA TODAY	Austria	News	01/01	19:00	81	23	24.2%	65.7%
THE BULL OF TOELZ	Germany	Series–Crime	10/01	20:14	1	92	21.3%	45.8%
VERA	Austria	Talkshow	25/02	21:04	37	49	20.0%	54.4%
ZEIT IM BILD 2	Austria	News	11/02	22:44	267	17	19.3%	64.4%
PALACE HOTEL ORTH	Austria	Series–Family	18/01	20:15	14	45	18.6%	45.6%
THE DREAMBOAT	Germany	Series–Family	01/01	20:14	11	90	17.6%	40.3%
THEME	Austria	Magazine	01/03	21:11	43	44	17.6%	49.9%
KOMMISSAR REX	Germany	Series–Crime	11/03	20:14	1	46	17.6%	46.6%

Top 10 Single Programmes	Land	Genre	Date	Start.T.	Length (m.)	Aud.	Share
ELECTIONS 99/RESULTS	Austria	News	03/10	19:00	22	26.2%	71.3%
PROVINCIAL ELECTIONS 99	Austria	News	07/03	18:58	17	22.0%	60.6%
ELECTIONS 99/2ND PROJECTION	Austria	News	03/10	17:59	30	21.3%	67.9%
ELECTIONS 99/FED. STATE STUDIOS	Austria	News	03/10	18:31	25	21.0%	65.6%
ELECTIONS 99/CONFRONTATIONS	Austria	Debate	30/09	20:15	115	21.0%	56.7%
VIENNA OPERA BALL 1999	Austria	Society Event	11/02	21:49	49	20.8%	48.8%
ZEIT IM BILD SPEZIAL	Austria	News	25/02	20:14	45	19.0%	43.0%
ELECTIONS 99 1ST PROJECTION	Austria	News	03/10	16:50	68	18.1%	67.3%
A HEART IS BECOM. YOUNG AGAIN	Austria	Movie	07/11	20:15	99	17.6%	41.5%
ALWAYS TROUBLE WITH NICOLE	Germany	Movie	20/01	20:15	90	17.3%	44.2%

Sources: Teletest 99; PC#TV

ARD								
Top 10 Recurrent Programmes	Land	Genre	Date	Start.T.	Runs	Length (m.)	Aud.	Share
SCENE OF CRIME	Germany	Series–Crime	26/09	20:16	77	99	3.8%	9.6%
ARD FOCUS	Germany	News	26/12	20:15	68	15	3.5%	9.1%
LIME-STREET	Germany	Series–Family	24/01	18:40	52	29	3.4%	10.7%
TAGESSCHAU	Germany	News	26/12	19:59	364	16	3.3%	9.4%
THE GOLDEN 1	Germany	Lottery Show	20/12	20:15	12	46	2.9%	7.6%
LOVE AND FURTHER DISASTERS	Germany	Series–Family	27/01	20:16	4	90	2.8%	7.2%
KEIN SCHOENER LAND	Germany	Series–General	22/02	20:15	9	44	2.7%	6.4%
SCHIMANSKI	Germany	Series–Crime	07/11	20:15	1	98	2.7%	6.3%
THE COUNTRY DOCTOR	Germany	Series–Family	27/08	20:16	1	98	2.6%	8.7%
THE CZAR'S COURIER	Germany	Series–General	27/12	20:17	2	96	2.6%	7.0%

Top 10 Single Programmes	Land	Genre	Date	Start.T.		Length (m.)	Aud.	Share
THE WINTER CELEB. OF FOLK MUSIC	Germany	Music Show	19/02	20:16		124	4.4%	11.8%
THE SPRING CELEB. OF FOLK MUSIC	Germany	Music Show	24/04	20:15		111	3.4%	9.9%
TRUE FELLOWS	Germany	Movie	17/03	20:16		96	3.4%	9.3%
SISTER ACT	USA	Movie	08/01	20:16		93	2.9%	7.6%
THE AUTUMN CELEB.OF FOLK MUSIC	Germany	Music Show	02/10	20:16		120	2.9%	8.8%
STARS IN THE CIRCUS	Germany	Circus Show	26/12	20:31		104	2.8%	7.4%
STEELNET	Germany	Movie	19/09	20:16		84	2.6%	7.1%
STARGATE	USA	Movie	03/01	20:16		110	2.6%	6.0%
SOCCER		Sport	12/06	19:30		158	2.6%	9.8%
THE PRICE OF LONGING	Germany	Movie	15/12	20:16		89	2.6%	7.2%

Sources: Teletest 99; PC#TV

ZDF								
Top 10 Recurrent Programmes	Land	Genre	Date	Start.T.	Runs	Length (m.)	Aud.	Share
THE FOLK HITPARADE	Germany	Music Show	20/05	20:16	2	58	3.4%	9.0%
HIDDEN CAMERA	Germany	Reality Show	03/11	20:17	18	45	3.2%	8.5%
THE OLD ONE	Germany	Series-Crime	12/02	20:18	61	56	3.1%	7.5%
THE DREAMBOAT	Germany	Series-General	22/08	20:15	6	96	2.8%	8.1%
ROSA ROTH	Germany	Series-Crime	25/09	20:15	3	99	2.4%	7.5%
TODAY	Germany	News	05/04	21:58	364	11	2.3%	7.3%
CAPE OF GOOD HOPE	Germany	Series-General	13/05	20:17	6	98	2.2%	5.7%
OUR CHARLY	Germany	Series-Family	17/04	19:38	35	45	2.0%	6.9%
WANNA BET	Germany	Game Show	20/02	20:16	7	158	2.0%	5.3%
DERRICK	Germany	Series-Crime	22/11	17:51	49	55	1.9%	8.0%

Top 10 Single Programmes	Land	Genre	Date	Start.T.		Length (m.)	Aud.	Share
WINTERWONDERLAND	Germany	Music Show	02/12	20:16		60	4.3%	11.4%
SUPERHITPARADE OF FOLK MUSIC	Germany	Music Show	07/11	20:14		118	4.1%	10.2%
WILD EMPEROR	Germany	Movie	28/12	20:18		84	4.0%	10.0%
ROSAMUNDE PILCHER	Ger/Aut	Movie	28/11	20:17		87	3.8%	8.3%
I'M NOT A MAN FOR...	Germany	Movie	19/05	20:16		88	3.0%	9.2%
MERRY MUSICIANS	Germany	Show Music	11/11	20:18		59	3.0%	7.2%
I GIVE YOU MY MAN	Germany	Movie	05/01	20:16		88	2.9%	8.1%
ANDRE RIEU	Germany	Show Music	24/11	20:16		49	2.9%	7.5%
THE BEST YEARS	Germany	Movie	29/11	20:15		89	2.8%	7.4%
HEART OVER BOARD	Germany	Movie	30/12	20:15		88	2.8%	7.6%

Sources: Teletest 99; PC#TV

RTL								
Top 10 Recurrent Programmes	Land	Genre	Date	Start.T.	Runs	Length (m.)	Aud.	Share
GOOD TIMES. BAD TIMES	Germany	Ser.-Daily Soap	22/02	19:38	257	26	4.3%	10.7%
TOTALLY CRAZY	Germany	Reality Show	12/02	20:14	20	46	4.1%	10.0%
WHO WANTS TO BE A MILLIONAIRE	Germany	Game Show	06/09	20:14	4	48	3.9%	12.0%
EMERGENCY CALL	Germany	Reality Show	21/02	19:09	43	47	3.7%	9.4%
DOUBLE ACTION	Germany	Series-Crime	19/01	20:15	4	93	3.6%	10.0%
THE 100.000 MARK SHOW	Germany	Game Show	24/04	20:14	7	82	3.5%	10.2%
LIFE TOTALLY CRAZY	Germany	Reality Show	09/04	20:15	17	47	3.3%	9.6%
HOUSEFEVER	Germany	Game Show	08/05	20:14	6	82	3.3%	10.2%
ALARM FOR COBRA 11	Germany	Series-Crime	16/12	20:16	6	86	3.3%	9.5%
DREAM-WEDDING	Germany	Game Show	30/10	20:14	8	84	3.3%	9.4%

Top 10 Single Programmes	Land	Genre	Date	Start.T.		Length (m.)	Aud.	Share
DOMINO DAY		Show	05/11	20:48		93	8.1%	26.1%
THE ROCK	USA	Movie	02/04	20:15		113	4.8%	13.7%
DEADLY SINS WHO TWO...	Germany	Movie	08/12	20:16		91	4.0%	10.0%
LAST HOPE OF THE BLOOD	Germany	Movie	30/06	20:15		87	3.5%	11.1%
HAMBURG. CITY IN FEAR	Germany	Movie	26/01	20:16		95	3.5%	9.8%
FOR LOVE AND MONEY	USA	Movie	25/07	20:15		88	3.3%	11.1%
SEVEN DAYS TO HAPPINESS	Germany	Movie	12/05	20:15		90	3.2%	10.3%
THE BLASTED BABY YEAR	Germany	Movie	05/05	20:15		92	3.2%	9.1%
THE PUMA. FIGHTER WITH HEART	Germany	Movie	09/12	20:15		89	3.2%	8.7%
MR. BILL	USA	Movie	10/07	20:15		113	3.2%	10.3%

Sources: Teletest 99; PC#TV

SAT 1								
Top 10 Recurrent Programmes	Land	Genre	Date	Start.T.	Runs	Length (m.)	Aud.	Share
THE COUNT OF MONTE CRISTO	G./It./Fr.	Series-General	12/01	20:14	4	102	4.9%	13.8%
WHEEL OF FORTUNE	Germany	Game Show	17/01	20:14	9	86	4.8%	11.1%
REVENGE IS SWEET	Germany	Game Show	24/01	20:14	8	85	4.6%	10.9%
CAUTION CAMERA. THE ORIGINAL	Germany	Reality Show	03/01	20:14	1	87	4.4%	10.1%
CAUTION CAMERA	Germany	Reality Show	14/11	20:14	10	92	3.6%	9.2%
SYLVIA. A CLASS OF HER OWN	Germany	Series-Family	17/02	20:14	6	45	3.6%	9.1%
THE BULL OF TOELZ	Germany	Series-Crime	21/04	21:15	22	88	3.5%	12.2%
ALL YOU NEED IS LOVE	Germany	Game Show	14/02	20:13	18	84	3.3%	7.1%
THE HOUR OF TRUTH	Germany	Game Show	29/10	20:14	10	47	3.3%	9.3%
KOMMISSAR REX	Germany	Series-Crime	21/10	20:18	27	44	3.2%	8.5%

Top 10 Single Programmes	Land	Genre	Date	Start.T.		Length (m.)	Aud.	Share
PRETTY WOMAN	USA	Movie	28/11	20:14		112	5.3%	12.8%
MRS. WINTERBOURNE	USA	Movie	21/03	20:14		94	4.9%	11.7%
JACKS BABY	Germany	Movie	17/10	20:14		93	3.4%	8.7%
THE KIDNAPPING	Germany	Movie	06/04	20:13		100	3.1%	9.1%
THE GIRL ROSEMARIE	Germany	Movie	02/12	20:14		134	3.0%	9.5%
A FEW GOOD MEN	USA	Movie	13/06	20:14		126	3.0%	8.6%
AMOR. DEADLY GAME BEC. OF LOVE	Germany	Movie	04/05	20:14		92	3.0%	8.8%
SEDUCED. A DANGEROUS AFFAIR	Germany	Movie	02/03	20:14		97	2.9%	7.9%
CALLBOYS. ALL LUST HAS...	Germany	Movie	11/05	20:12		92	2.9%	9.0%
SLEEPLESS IN SEATTLE	USA	Movie	05/04	20:14		98	2.9%	7.3%

Sources: Teletest 99; PC#TV

PRO 7								
Top 10 Recurrent Programmes	Land	Genre	Date	Start.T.	Runs	Length (m.)	Aud.	Share
EMERGENCY ROOM	USA	Series-Crime	10/02	20:21	11	42	3.0%	7.2%
LOVE'S SINS	Germany	Magazine	24/11	22:16	52	40	2.8%	12.7%
ANDREAS TUERK	Germany	Talk Show	19/02	15:00	252	45	2.6%	20.5%
X-FILES	USA	Series-Mystery	27/09	20:14	42	45	2.5%	7.5%
WORLD OF MIRACLES	Germany	Documentary	18/04	19:43	101	20	2.4%	7.1%
GALILEO	Germany	Documentary	24/02	19:49	277	17	2.2%	5.6%
TOUGH	Germany	News	02/02	19:00	78	23	2.2%	6.1%
CHICAGO HOPE HOSPITAL	USA	Series-General	24/02	21:16	13	45	2.2%	5.9%
CHARLIE AND LOUISE	Germany	Series-Family	04/12	20:14	1	91	2.2%	6.0%
TALK TALK TALK	Germany	Talk Show	20/11	18:59	17	23	2.0%	6.7%

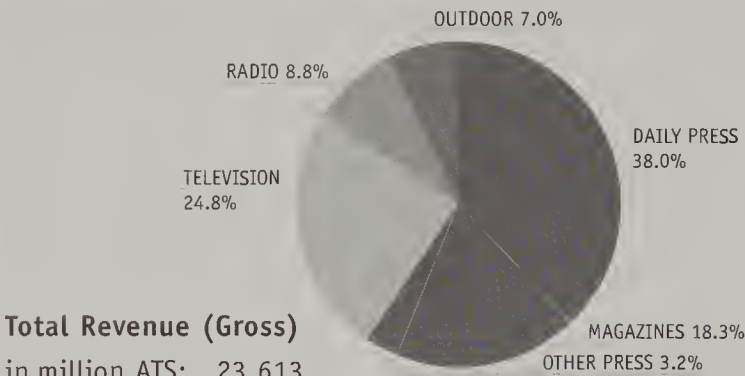
Top 10 Single Programmes	Land	Genre	Date	Start.T.	Length (m.)	Aud.	Share
ERR IS MALE	Germany	Movie	05/03	20:14	96	4.0%	11.5%
POCKET MONEY	Germany	Movie	14/11	20:14	101	3.9%	10.1%
SLEEPERS	USA	Movie	21/11	20:14	133	3.9%	10.6%
TIME TO KILL	USA	Movie	03/10	20:15	140	3.8%	11.3%
CURLY SUE	USA	Movie	31/01	20:15	94	3.3%	8.5%
BREAKDOWN	USA	Movie	17/04	22:00	88	3.3%	14.5%
MRS. DOUBTFIRE	USA	Movie	09/01	20:14	116	3.3%	9.1%
SPACE JAM	USA	Movie	23/10	20:14	98	3.2%	8.4%
NICK OF TIME	USA	Movie	07/02	20:14	98	3.2%	6.4%
THE NAKED GUN 33 1/3	USA	Movie	17/04	20:14	75	3.1%	9.2%

Sources: Teletest 99; PC#TV

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend (in million ATS)		23 613
Total adspend (in million USD)		1 736
Total adspend (in million EUR)		1 716
TV adspend (in million ATS)		5 848
TV adspend (in million USD)		430
TV adspend (in million EUR)		425
TV adspend in % of GDP		0.22
TV adspend per capita (USD)		53

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in%	

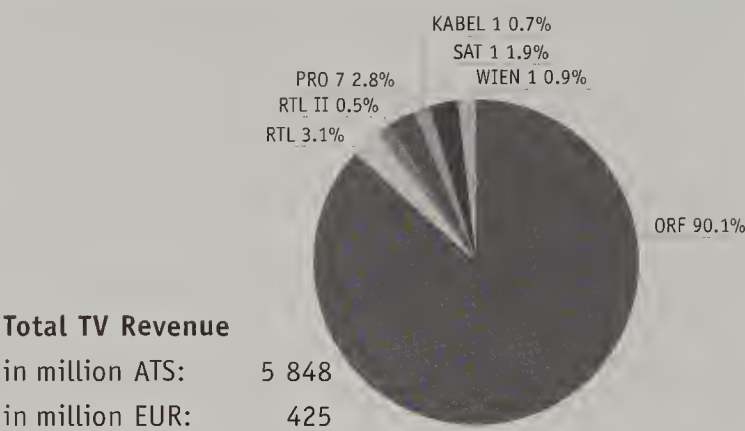


Total Revenue (Gross)
in million ATS: 23 613
in million EUR: 1 716

TV ADVERTISING STATISTICS	
Total number of spots broadcast	332 490
Average spot length (in sec.)	24
Total number of advertisers	n.a.
Number of TV advertisers	692
Total number of advertised products	17 775
Number products advertised on TV	1 327

Source: FOCUS Media Research

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in%



Total TV Revenue
in million ATS: 5 848
in million EUR: 425

TOP 10 ADVERTISING FIGURES (GROSS)				
TV Advertising Sectors	4 Media*	Television	Spent in TV	Share of TV Expenditure
FOOD	1 670	1 128	67.6	19.3
COSMETICS/PHARMACEUTICALS	1 516	765	50.5	13.1
BEVERAGE INDUSTRY	987	556	56.3	9.5
OFFICE/COMPUTER/COMMUNICATION	2 766	555	20.0	9.5
HOME & GARDEN	1 501	437	29.1	7.5
FINANCE	2 027	401	19.8	6.9
CLEANING	418	359	85.8	6.1
MEDIA	1 637	313	19.1	5.4
CARS & ACCESSOIRES	1 956	293	15.0	5.0
COMMERCIAL & DELIVERY	1 605	263	16.4	4.5
OTHER	7 530	779	10.3	13.3
TV Advertisers				
PROCTER & GAMBLE AUSTRIA	342	283	83	4.8
ÖSTERREICHISCHE UNILEVER	370	274	74	4.7
MASTER FOODS AUSTRIA	276	230	83	3.9
HENKEL AUSTRIA	257	199	77	3.4
L'OREAL AUTRICHE HAARKOS	145	123	84	2.1
KRAFT-JACOBS-SUCHARD ÖSTERREICH	159	116	73	2.0
MC DONALD'S DEVELOPMENT COMP.	153	103	67	1.8
COCA COLA	155	99	64	1.7
BML-KONZERN (RETAIL)	418	98	23	1.7
CONNECT AUSTRIA (TELECOMMUNICATION)	248	98	39	1.7
OTHER	21 089	4 226	20	72.3
Total (in million ATS)	23 613	5 848	25.0%	100.0%
Total (in million EUR)	1 716	425	25.0%	100.0%

Source: FOCUS Media Research

*Press, TV, Radio, Outdoor

Belgium

The South

In the South, the private channel RTL-TVI continues to lead the market with an audience share of 23.5% (target 15+, time slot between 17:00 and 23:00). Club RTL is the market leader for children (24.1% market share/target 4-14, time slot between 16:00 and 20:30). Its market share for evening programming, which is targeted at adults 15-44 years, is still increasing, with an excellent performance among young adults. The performance of the public channels is stable. La Une obtains an audience share of 21.5%, La Deux – with a cultural and event based programming - has an audience share of 2.9% (target 15+, time slot between 17:00 and 23:00). The alliance with Eurosport, which had gradually declined since the second semester of 1998 (only few Belgian sport windows remained), was stopped in the course of the year 1999. The channel is no longer broadcast in Belgium due to dissension between Eurosport France and the Belgian cable operators. Broadcasting stopped in January 2000.

The North

In the North, VTM remains leader with a market share of 30.8% (target 15+, time slot between 17:00 and 23:00). Kanaal 2, the smaller channel of the VTM-family, has stabilised – after a small decline in 1998 -with a market share of 6.5% (target 15+, time slot between 17:00 and 23:00). VT4 decreased its market share and reached 7.7% (target 15+, time slot between 17:00 and 23:00). The public channel TV1 is clearly the second most popular channel in the North with an audience share of 26.1%. Ketnet/Canvas reaches a market share of 7.4% (Ketnet, which targets children and youngsters, is on air from the afternoon until 20:00, and Canvas, rather highbrow and culturally oriented, starts at 20:00). Ketnet consolidated its position as market leader on children (23.9% market share/target 4-14, time slot between 16:00 and 20:00), VT4 comes in second place with a decreasing share of 18.9%.

The pay TV channel Canal Plus, since 1998 covering both the North and the South, developed its digital offer in 1999 in both regions, but without gaining much audience share.

New Channels

Locally some cable companies offer thematic channels. In April 1998, the first home shopping channel (LTA) broadcasting 24 hours a day (live between 13:00 and 21:00 with 2 reruns) was launched in the South. Two years later, the channel joined the home shopping European group H.O.T. and became H.O.T. Le Grand Magasin. Kanaal Z, a new thematic channel offering information on business, financial and stock-exchange quotations (a rather unique programming for Europe) emerged in February 1999 in the North of the country. In May 2000, the same concept was launched in the South (Canal Z). Event TV, a channel covering all kind of events, was launched in January 1999 – in the north as well as the south

of Belgium – and disappeared the same year. Both channels were approached by Liberty Channels, the first group specialized in touristic communication in Europe, and are now broadcasting travel programmes and home shopping under the name of „Liberty TV.com“.

Programming

In the South we find a very high interest for „news“. Traditionally the two news programmes (private and public channel) appear at the top of the ranking. In May 1999, a charity programme to help Kosovo was broadcast on private and public channels simultaneously. It took the 5th place in the Top.

Traditionally we find a higher offer of local productions on the main Flemish channels (TV1 and VTM). The most original programme formats can be found on TV1 with „De Mol“ (the Mole) a drop-out game series where the winner is the one who identifies a „traitor“ and „Het leven zoals het is“ (Life as it is) a docu-soap. „De Mol“ won the golden rose at Montreux in May 2000. „Help Kosovo“, broadcast on both private and public channels as seen in the South, appears at the 4th place in the top.

Concerning the overall TV consumption, a decrease in children’s viewing time (4-14 year) can be observed, in the North (- 6 minutes) as well as in the South (- 15 minutes).

Advertising

1998 saw a spectacular increase in advertising expenditure in the South of Belgium. In 1999, TV increased its position further with 5.4%, representing 41% of the global media-investments.

The leading advertising sector in television is that of food and drink with a 25.6% share of television expenditure. Procter and Gamble is, as in many European countries, the leading advertising company.

Belgium

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General Data

COUNTRY	
Land area (km²)	30 528
Total population	10 213 752
Number of households	4 538 000
Average household size	2.3
In % of households/population equipped	
Phone	91.9/93.0
Mobile telephone subscribers	10.5/ 9.7
PC's	33.0/ n.a.
Internet access	13.7/ n.a.

Source: INS-CMI 98/99

ECONOMICS	
GDP in billion BEF (at current prices)	9 395
GDP per capita in BEF (at current prices)	917 733
Inflation rate in 1999 (in %)	1.9
Value of BEF in Euro (EUR)*	1 EUR = 40.34 BEF
Value of BEF in US-Dollar (USD)*	1 USD = 40.16 BEF

Source: INS-CMI 98/99

*December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	4 301 000
In % of all households	94.8
Numbers of channels received by 70% of the population	28
TV License-Fee cost per year	BEF 7608.–/EUR 188.6

TV EQUIPMENT	
	in % of TVHH
Colour TV	95.0*
Multiset (homes with more than 1 TV set)	23.7
VCR	68.1
Teletext	56.0
Remote control	95.0

Source: CIM 98/99 *estimated by IPB

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	95.0
	connected	94.6
Satellite	private dish/DTH*	3.1
	collective dish/SMATV**	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

*includes SMATV; **included in DTH

TV SUBSCRIPTION			
Analog pay TV subscribers	3.7%	Digital TV subscribers	5.4%

Source: CIM 98/99

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
LA UNE	1955	T, C	100%	French	112	Generalist	L–F, Adv.	RMB
LA DEUX	1997	T, C	100%	French	130	Generalist	L–F, Adv.	RMB
TV1	1958	T, C	100%	Dutch	102	Generalist	L–F, Spon.	VAR
KETNET-CANVAS	1958	T, C	90%	Dutch	66	Generalist	L–F, Spon.	VAR

Source: Intermixt 99, Technical penetration : univers = cable subscribers

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
RTL-TVI	1987	C	100% ⁽¹⁾	French	95	Generalist	Adv.	IPB
CLUB RTL	1995	C	100% ⁽¹⁾	French	90	Generalist	Adv.	IPB
VTM	1989	C	100% ⁽²⁾	Dutch	119	Generalist	Adv.	VMM
KANAAL 2	1995	C	82% ⁽²⁾	Dutch	133	Generalist	Adv.	VMM
VT4	1995	C, S	100% ⁽²⁾	Dutch	128	Generalist	Adv.	VT4
LTA	1998	C	74% ⁽¹⁾	French	56	Tele-Shopping	Adv.	Intermag
LIBERTY TV.COM FR	1999	C	47% ⁽¹⁾	French	5	Event	Adv.	Liberty TV
LIBERTY TV.COM NL	1999	C	84% ⁽²⁾	Dutch	5	Event	Adv.	Liberty TV
KANAAL Z	1999	C	75% ⁽²⁾	Dutch	4	News (Economic)	Adv.	RMG

Source: Intermixt 99, ⁽¹⁾ South only – ⁽²⁾ North only–Technical penetration : univers = cable subscribers

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ARTE	Public	T, C, S	100%	Fr./German	Cultural	L–F, Spon.
MCM	Private	C, S	33%	French	Music	Adv.
RTP INT.	Public	C, S	25%	Portuguese	Generalist	L–F, Adv.
TVE INT.	Public	C, S	93%	Spanish	Generalist	L–F, Adv.
TRT INT.	Public	C, S	52%	Turkish	Generalist	L–F, Adv.
TV5 EUROPE	Public	C, S	42%	French	Generalist	L–F, Spon.
EUROSPORT INT.	Private	C, S	69%	Dutch	Sport	Adv.
EURONEWS	Private	C, S	41%	French	News, Docum.	Adv.
CNBC EUROPE/NAT GEOGRAPHIC	Private	C, S	78%	English	Generalist	Adv.
MTV EUROPE	Private	C, S	98%	English	Music	Adv.
TNT/CARTOON	Private	C, S	4%	Eng./French	Mov./Cartoons	Adv.
CNN INT.	Private	C, S	92%	English	News, Docum.	Adv.
EUROSPORT FR.	Private	C, S	36%	French	Sport	Adv.
BBC WORLD	Private	C, S	66%	English	News, Docum.	Adv.

Source: Intermixt 99/Technical penetration: univers = cable subscribers

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
TF1	Private	T, C, S	43%	French	Generalist	Adv.
France 2	Public	T, C, S	100%	French	Generalist	L–F, Adv.
France 3	Public	T, C, S	100%	French	Generalist	L–F, Adv.
NEDERLAND 1	Public	T, C	87%	Dutch	Generalist	L–F, Adv.
NEDERLAND 2	Public	T, C	92%	Dutch	Generalist	L–F, Adv.
NEDERLAND 3	Public	T, C	70%	Dutch	Generalist	L–F, Adv.
ARD	Public	T, C, S	99%	German	Generalist	L–F, Adv.
ZDF	Public	T, C, S	98%	German	Generalist	L–F, Adv.
WEST 3	Public	T, C, S	27%	German	Generalist	L–F
SÜDWEST TV	Public	C, S	1%	German	Generalist	L–F
RTL	Private	C, S	14%	German	Generalist	Adv.
BBC 1	Public	C	97%	English	Generalist	L–F
BBC 2	Public	C	84%	English	Generalist	L–F
ITV	Private	T, C	8%	English	Generalist	Adv.
RAI UNO	Public	C, S	66%	Italian	Generalist	L–F, Adv.
LA CINQUIEME	Public	C, S	10%	French	Educ., Discovery	L–F, Adv.
TMF	Private	C, S	45%	Dutch	Music	n.a.

Source: Intermixt 99/Technical penetration : univers = cable subscribers

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
CANAL+ SOUTH	1989	T, C	162 000	French	168	Mov./Sport	1149	Adv., Sub.	RMB
UPC (ex TVD '96)	1998	C	n.a.	French	n.a.	n.a.	450*-795**	Sub.	n.a.
BRUTELE	1997	C	n.a.	French	n.a.	n.a.	393***	Sub.	n.a.

Source: IPB

* (3 channnels), ** (All channels =11), *** (11 channels)

DIGITAL PACKAGES								
Channels	Launch	Diff.	Subscr.	Language	No.of ch.	Revenue	Cost/month	
CANAL+ DIGITAL (NORTH)	1999	C	30 000	Dutch	14	Sub.	1695	
CANAL+ NOORD (*)	1997	C	164 200	Dutch	2	n.a.	n.a.	
LE BOUQUET CANAL+ (SOUTH)	1999	C	30 000	French	20	Sub.	1295	
CANAL+ SOUTH (**)	1999	C	10 000	French	3	Sub.	1499	
CANAL+ DIG. LE Bouquet (SOUTH)	1999	C	n.a.	French	23	Sub.	1999	

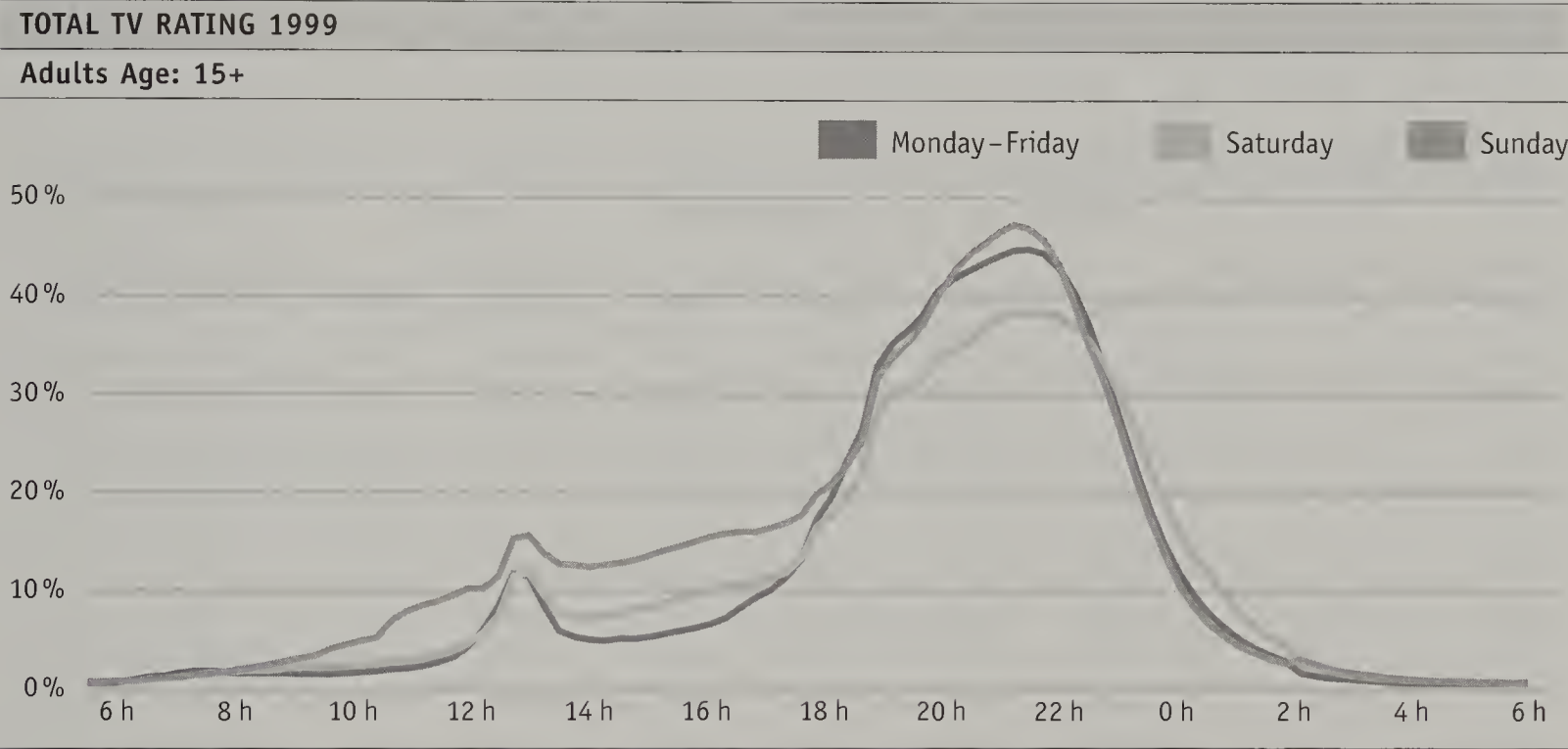
Source: IPB

*Canal+/Canal+ Blue,**Canal+/Canal+ Yellow/Canal+ Blue

Viewing Patterns – North Belgium

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	N.V. AUDIMETRIE S.A.
Panel/Sampling Size	1 500 (750 South-750 North)
Instrument used (people-meter, telefon, face-to-face)	People-meter AGB 9400/5
Population size in 000	
Individuals 4+	5 506
Adults 15+	4 733
Main Purchase Responsibles 15+	2 526
Young Adults 15-34	1 554
Children 4-14	773

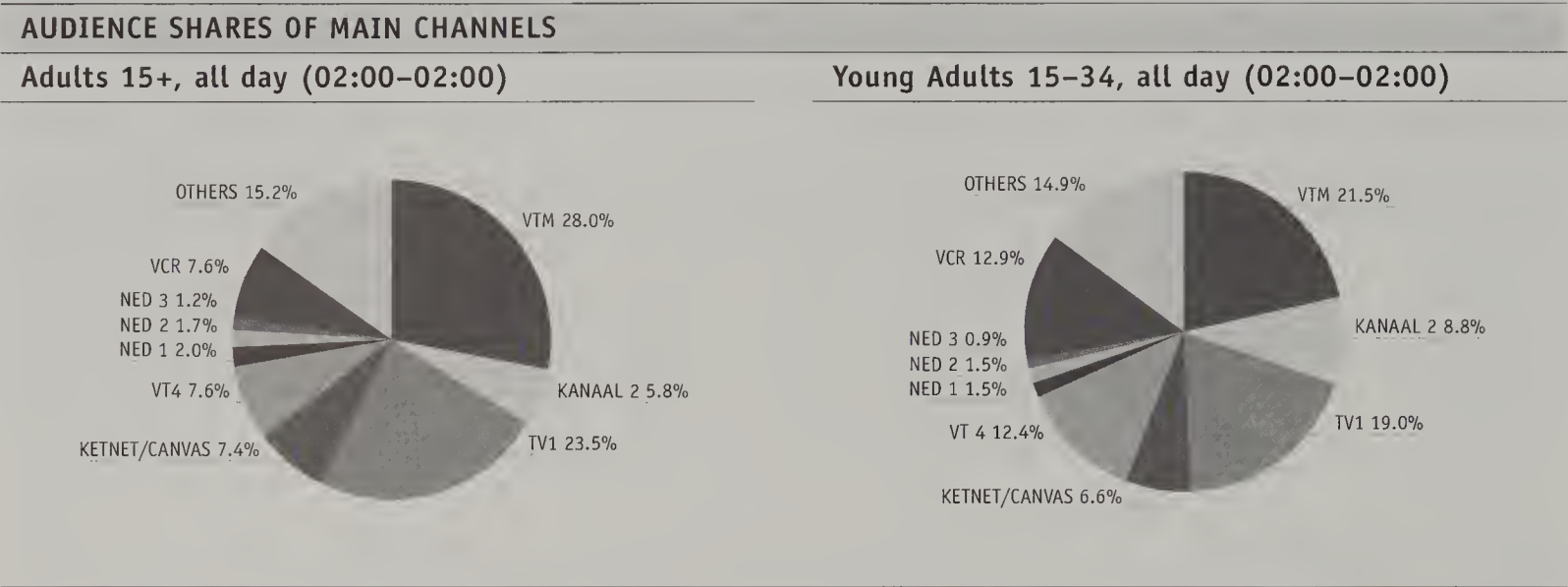
Source: Audimétrie CIM North 1999



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 15+			Children 4-14			Young Adults 15-34			Main Purchase Responsibles (15+)		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	71.4	70.8	70	61.5	58.6	55.2	61.6	61.1	59.5	75.9	74.3	73.7
Viewing time per Viewer	235	236	235	163	164	158	194	198	196	251	251	247
Viewing time per Individual	168	167	164	100	96	87	119	121	116	190	186	182

Source: Audimétrie CIM North-Monday-Sunday-Reach=1sec

Audience Shares – North Belgium



Source: Audimetrie CIM North/1999

AUDIENCE SHARES OF MAIN CHANNELS/ ALL DAY 02:00 – 02:00								
	Adults 15+		Young Adults 15–34		Children 4–14*		Main Purchase Responsibles (15+)	
	1998	1999	1998	1999	1998	1999	1998	1999
VTM	28.0%	28.0%	24.1%	21.5%	15.0%	15.1%	28.8%	28.9%
KANAAL 2	5.5%	5.8%	7.6%	8.8%	8.3%	7.0%	5.1%	5.2%
TV1	22.1%	23.5%	17.3%	19.0%	8.0%	7.9%	23.1%	24.2%
KETNET/CANVAS	8.5%	7.4%	7.7%	6.6%	22.7%	23.9%	8.0%	7.2%
VT 4	8.5%	7.6%	14.0%	12.4%	21.4%	18.9%	7.7%	6.8%
NED 1	2.0%	2.0%	1.7%	1.5%	1.1%	1.1%	2.3%	2.3%
NED 2	1.9%	1.7%	1.7%	1.5%	1.1%	1.3%	1.9%	1.8%
NED 3	1.2%	1.2%	1.0%	0.9%	1.3%	1.8%	1.4%	1.3%
VCR	7.7%	7.6%	11.3%	12.9%	12.2%	13.0%	7.5%	7.8%
OTHERS	14.6%	15.2%	13.6%	14.9%	8.9%	10.0%	14.2%	14.5%

Source: Audimetrie CIM South

*all day children: 16:00–20:00

AUDIENCE SHARES OF MAIN CHANNELS/ BY DAY PARTS						
	Adults 15+		Young Adults 15–34		Main Purchase Responsibles (15+)	
	Day Time 12– 19 h	Prime Time 19– 22.30 h	Day Time 12– 19 h	Prime Time 19– 22.30 h	Day Time 12– 19 h	Prime Time 19– 22.30 h
VTM	24.9%	33.0%	17.0%	25.7%	26.8%	33.4%
KANAAL 2	3.7%	6.3%	6.6%	10.3%	3.1%	5.8%
TV1	26.5%	25.8%	17.6%	23.4%	28.0%	26.2%
CANVAS	6.4%	7.7%	7.5%	6.5%	5.6%	7.8%
VT 4	5.6%	7.2%	11.8%	12.2%	4.6%	6.6%
NED 1	1.3%	2.0%	1.3%	1.2%	1.4%	2.2%
NED 2	2.0%	1.5%	1.8%	1.3%	2.1%	1.5%
NED 3	1.3%	1.0%	1.6%	0.7%	1.4%	1.1%
VIDEO	9.0%	5.0%	15.4%	8.9%	8.9%	5.0%
OTHERS	19.3%	10.5%	19.4%	9.8%	18.1%	10.4%

Source: Audimetrie CIM North/1999

Top Programmes all Channels – North Belgium

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
THE XII WORKS OF VANOUDENHOFEN	Belgium	TV1	Variety Show	20:32	12/12	33.5%	59.4%
GRAND PRIX (II) 99*	Belgium	TV1	Variety Show	22:16	28/02	31.6%	63.3%
COPPERS	Belgium	TV1	Series-Crime	21:35	12/12	30.8%	57.4%
HELP KOSOVO	Belgium	TV1+VTM	Magazine	20:30	26/04	29.5%	68.7%
THE MOLE	Belgium	TV1	Game Show	19:58	24/01	29.1%	54.0%
CAUGHT RED HANDED	Belgium	TV1	Series-Crime	21:17	28/02	28.4%	50.7%
GRAND PRIX EUROVISION**		TV1	Variety Show	21:00	29/05	27.2%	69.3%
GRAND PRIX 99 (I)*	Belgium	TV1	Variety Show	19:56	28/02	25.6%	49.7%
FC THE CHAMPIONS	Belgium	TV1	Sitcom	20:51	02/01	25.5%	53.7%
WHO WANTS TO BE***	Belgium	VTM	Game Show	20:25	14/12	23.8%	49.7%
JAMBERS Magazine	Belgium	VTM	Magazine	21:52	14/01	23.5%	54.4%
2 STREETS FARTHER	Belgium	VTM	Comedy Show	20:25	29/11	23.3%	46.2%
GALA 10 YEARS VTM	Belgium	VTM	Variety Show	20:21	30/01	23.1%	52.0%
GOEDELE	Belgium	VTM	Talk Show	20:55	04/01	22.0%	45.0%
WITTEKERKE	Belgium	VTM	Series-General	20:57	12/01	22.0%	42.3%
VERSCHOTEN & SON	Belgium	VTM	Sitcom	20:22	30/08	21.6%	47.7%
NEWS 19H VTM	Belgium	VTM	News	18:59	10/02	21.4%	50.8%
THE LANDLADY	Belgium	VTM	Sitcom	20:21	08/02	21.3%	41.4%
GEERT HOSTE 3000	Belgium	TV1	Comedy Show	22:07	02/01	20.9%	45.1%
THE GOLDEN SHOE 1998	Belgium	VTM	Variety Show	20:01	20/01	20.8%	43.8%

Source: AUDIMETRIE CIM NORTH-1999-ADULTS 15+

*National Contest, **de la Chanson 99, ***a Multimillionaire

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
DECEIVED BY TRUST	USA	VTM	21:41	24/01	15.0%	39.6%
BABE	Australia/USA	VTM	20:27	16/04	14.5%	36.3%
CRITICAL DECISION	USA	VTM	20:26	23/04	13.4%	32.4%
RANSOM	USA	VTM	20:51	03/12	13.1%	29.6%
STRIPTease	USA	TV1	21:49	26/11	12.7%	34.1%
NO ONE COULD PROTECT HER	USA	TV1	20:31	02/02	12.6%	25.5%
THE DISAPPEARANCE OF VONNIE	USA	TV1	20:35	09/02	12.3%	23.5%
THE ENGLISH PATIENT	USA	VTM	20:26	10/12	12.1%	29.4%
EVERY 9 SECONDS	USA	TV1	20:40	18/05	12.0%	25.0%
OESJE!	Belgium	VT4	21:16	24/04	11.7%	29.6%

Source: AUDIMETRIE CIM NORTH-1999-ADULTS 15+

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL BELGIUM-MOROCCO		KAN 2	20:48	07/09	18.3%	37.0%
FBAL NETHERLANDS-BELGIUM		VTM	20:32	04/09	16.6%	47.1%
CYCLE RACING/PARIS-ROUBAIX		CANVAS	13:05	11/04	15.5%	66.9%
CYCLE RACING/TOUR OF FLANDERS		CANVAS	13:00	04/04	14.5%	70.9%
CYCLE RACING/TOUR OF FRANCE		TV1	13:30	21/07	12.7%	67.6%
CYCLE RACING/LIEGE-BASTOGNE-LIEGE		CANVAS	14:23	18/04	12.6%	65.6%
FBAL BELGIUM-FINLAND		KAN 2	20:02	18/08	12.4%	29.8%
CYCLE RACING/WC. VERONA		CANVAS	10:02	10/10	11.3%	59.2%
FBAL UEFA MANCHESTER-MUNCHEN		CANVAS	20:45	26/05	11.1%	26.7%
FBAL ITALY-BELGIUM		KAN 2	20:50	26/05	10.6%	23.2%

Source: AUDIMETRIE CIM NORTH-1999-ADULTS 15+

Top Programmes Channel by Channel – North Belgium

TV 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE XII WORKS OF VANOUDENHOVEN	Belgium	Variety Show	11	20:30	53	29.0%	53.4%
COPPERS	Belgium	Series–Crime	11	21:27	50	27.2%	51.3%
CAUGHT RED HANDED	Belgium	Series–Crime	10	21:17	56	24.0%	46.7%
THE MOLE	Belgium	Game Show	5	19:58	45	23.3%	44.6%
FC THE CHAMPIONS	Belgium	Sitcom	13	20:56	31	20.2%	45.5%
DOG BITES MAN	Belgium	Magazine	194	19:39	19	13.9%	34.7%
LIFE AS IT IS–POLICE	Belgium	Docu Soap	5	20:38	27	13.3%	28.1%
AT HOME	Belgium	Daily Soap	197	20:07	25	13.0%	29.7%
CHOIT NATURAL	Belgium	Variety Show	12	20:34	47	12.8%	28.3%
SWINGPALACE	Belgium	Variety Show	13	20:35	68	12.6%	29.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GRAND PRIX (NAT. CONT.) 99 (II)	Belgium	Variety Show	28/02	22:16	28	31.6%	63.3%
GRAND PRIX EUROV. DE LA CHAN. 99		Variety Show	29/05	21:00	193	27.2%	69.3%
GRAND PRIX (NAT. CONT.) 99 (I)	Belgium	Variety Show	28/02	19:56	79	25.6%	49.7%
GEERT HOSTE 3000	Belgium	Comedy Show	02/01	22:07	55	20.9%	45.1%
THE BIG ELECTIONSHOW	Belgium	Debates	13/06	22:30	44	20.6%	49.2%
BLOCKS–CHAMPIONS FINAL	Belgium	Game Show	02/01	21:29	35	16.7%	33.9%
SPORTS PERSONALITY OF THE YEAR	Belgium	Variety Show	13/01	20:36	95	14.5%	29.5%
EXTRA NEWS –SOLAR ECLIPSE	Belgium	News	11/08	10:59	103	13.7%	51.1%
FILIP&MATHILDE, ENGAG. PARTY	Belgium	Magazine	13/11	19:23	114	13.6%	31.4%
GEERT HOSTE CHRISTMAS	Belgium	Comedy Show	25/12	21:32	30	13.6%	31.5%

Source: AUDIMETRIE CIM NORTH–1999–ADULTS 15+

CANVAS							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
EVERYTHING CAN BE IMPROVED	Belgium	Comedy Show	9	21:57	29	11.3%	26.1%
WORD AGAINST WORD	Belgium	Magazine	8	21:25	63	7.7%	19.2%
A TOUCH OF FROST	UK	Series–Crime	12	20:56	101	5.5%	13.4%
THE PASSED WEEK	Belgium	Talk–Show	17	21:45	45	5.2%	11.2%
IT’S A SMALL WORLD	Belgium	Magazine	5	20:59	29	4.8%	9.6%
EVERYTHING CAN BE IMPROV. (REP.)	Belgium	Comedy Show	9	22:20	29	4.7%	11.5%
YOU RANG, M’LORD?	UK	Series–General	26	20:33	49	4.7%	13.5%
THE MEN OF THE POWER	Belgium	Comedy Show	5	21:31	29	4.7%	9.8%
OH DOCTOR BEECHING!	UK	Series–General	19	21:04	28	4.7%	11.8%
GEERT HOSTE SAVES THE COUNTRY	Belgium	Comedy Show	6	21:45	29	4.7%	9.4%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
CYCLE RACING/PARIS–ROUBAIX	Sport	11/04	13:05	230	15.5%	66.9%
CYCLE RACING/TOUR OF FLANDERS	Sport	04/04	13:00	213	14.5%	70.9%
CYCLE RACING/LIEGE–BASTOGNE–LIEGE	Sport	18/04	14:23	141	12.6%	65.6%
CYCLE RACING/WC. VERONA	Sport	10/10	10:02	396	11.3%	59.2%
FBAL UEFA MANCHESTER–BAYERN MUNICH	Sport	26/05	20:45	109	11.1%	26.7%
CYCLE RACING /HET VOLK	Sport	27/02	14:25	157	10.6%	62.0%
CYCLE CROSS COUNT./WC POPRAD–ELITE	Sport	31/01	12:54	82	9.8%	52.2%
CYCLE RACING/BRUSSELS–KUURNE–BRUSSELS	Sport	28/02	15:01	116	9.5%	51.6%
FBAL UEFA JUVENTUS–MANCHESTER	Sport	21/04	20:45	107	9.3%	20.6%
CYCLE RACING/PARIS–TOURS	Sport	03/10	16:11	81	9.2%	50.6%

Source: AUDIMETRIE CIM NORTH–1999–ADULTS 15+

VTM							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
2 STREETS FARTHER	Belgium	Comedy Show	5	20:28	28	21.5%	42.5%
WHO WANTS TO BE A MULTIMILLI.	Belgium	Game Show	36	20:28	43	19.6%	41.7%
VERSCHOTEN & SON	Belgium	Sitcom	13	20:26	30	18.8%	39.8%
THE 1.000.000 QUESTION	Belgium	Game Show	8	20:22	30	17.3%	36.1%
THE JACQUES VERMEIRE SHOW	Belgium	Comedy Show	8	20:23	29	17.1%	36.0%
JAMBERS MAGAZINE	Belgium	Magazine	43	22:10	45	16.8%	42.0%
BLIND DATE	Belgium	Variety Show	13	20:28	57	16.5%	35.4%
THE FEELING OF	Belgium	Variety Show	9	20:20	54	15.7%	36.2%
THE SURPRISE SHOW	Belgium	Reality Show	12	20:25	59	15.6%	34.5%
THE ETERNAL FIGHT	Belgium	Talk Show	12	20:58	61	15.4%	32.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GALA 10 YEARS VTM	Belgium	Variety Show	30/01	20:21	171	23.1%	52.0%
GOEDELE	Belgium	Talk Show	04/01	20:55	94	22.0%	45.0%
THE GOLDEN SHOE 1998	Belgium	Variety Show	20/01	20:01	93	20.8%	43.8%
ROYALTY-PRINCE FILIP	Belgium	Magazine	28/11	20:19	29	18.9%	35.5%
EXTRA NEWS-FILIP&MATHILDE	Belgium	News	03/12	18:59	61	18.4%	46.2%
MISS BELGIUM 1999	Belgium	Variety Show	26/03	20:20	157	18.1%	40.1%
FBAL NETHERLANDS-BELGIUM	Belgium	Sport	04/09	20:32	113	16.6%	47.1%
FILIP&MATHILDE, ENGAGEM. PARTY	Belgium	Magazine	13/11	18:59	133	16.5%	39.4%
KING ALBERT AND QUEEN PAOLA	Belgium	Documentary	06/06	20:40	58	16.0%	35.1%
MISS BELGIUM 2000	Belgium	Variety Show	17/12	20:20	156	15.9%	36.2%

Source: AUDIMETRIE CIM NORTH-1999-ADULTS 15+

*&MATHILDE SPECIAL

KANAAL 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
X-FILES	USA	Series-Mystery	4	20:21	49	4.0%	8.5%
STARGATE SG-2	USA	Series-Mystery	43	20:31	50	3.9%	9.1%
CHARMED	USA	Series-Mystery	22	19:30	51	3.1%	7.2%
X-TREME	Belgium	Magazine	37	20:27	26	2.8%	6.9%
SMILE PLEASE	Belgium	Comedy Show	13	20:25	26	2.7%	5.7%
FIRE CO. 133	USA	Series-Action	12	20:28	49	2.7%	8.6%
SPECIAL OPS FORCE	USA	Series-Action	7	20:27	49	2.6%	6.1%
BEVERLY HILLS 90211	USA	Series-Family	51	19:31	49	2.2%	6.0%
PENSACOLA-WINGS OF GOLD	USA	Series-Action	5	20:27	44	2.2%	5.2%
HOME AND AWAY	Australia	Daily Soap	260	18:34	23	2.1%	8.6%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL BELGIUM-MOROCCO	Sport	07/09	20:48	110	18.3%	37.0%
FBAL BELGIUM-FINLAND	Sport	18/08	20:02	114	12.4%	29.8%
FBAL ITALY-BELGIUM	Sport	13/11	20:50	110	10.6%	23.2%
FBAL BELGIUM-EGYPT	Sport	30/03	19:59	112	10.2%	21.9%
FBAL BELGIUM-BULGARY	Sport	27/03	19:59	113	10.0%	23.4%
FBAL CYPRUS-BELGIUM	Sport	03/02	20:00	116	9.5%	20.4%
FBAL BELGIUM-CH. REP.	Sport	09/02	20:00	109	9.2%	17.7%
FBAL UEFA BRUGGE-HAPOEL HAIFA	Sport	30/09	21:56	25	8.8%	18.8%
FBAL UEFA LIERSE-ZURICH	Sport	30/09	20:01	109	8.4%	18.0%
FBAL GREECE-BELGIUM	Sport	05/02	19:59	111	8.2%	17.9%

Source: AUDIMETRIE CIM NORTH-1999-ADULTS 15+

VT 4							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
GEERT HOSTE	Belgium	Comedy Show	7	20:29	27	6.2%	13.7%
TRACKLESS	Belgium	Magazine	13	21:24	55	5.4%	11.5%
CHRIS & CO	Belgium	Comedy Show	16	20:30	36	5.3%	11.2%
STRIPPERS	Belgium	Reality Show	7	22:28	31	5.0%	14.9%
BUSTED ON THE JOB	USA	Reality Show	4	22:29	27	4.2%	11.2%
DON'T FORGET YOUR TOOTHBRUSH	Belgium	Game Show	8	20:13	62	4.1%	10.6%
AMERICAN SEX	USA	Reality Show	6	21:59	53	4.1%	11.6%
THE ADVERTISING YEARS	Belgium	Show	12	20:31	25	3.8%	10.5%
FLANDERS BOULEVARD	Belgium	Magazine	13	22:10	52	3.8%	10.4%
FUNNY BLOOPERS	Belgium	Comedy Show	28	20:28	26	3.4%	8.6%

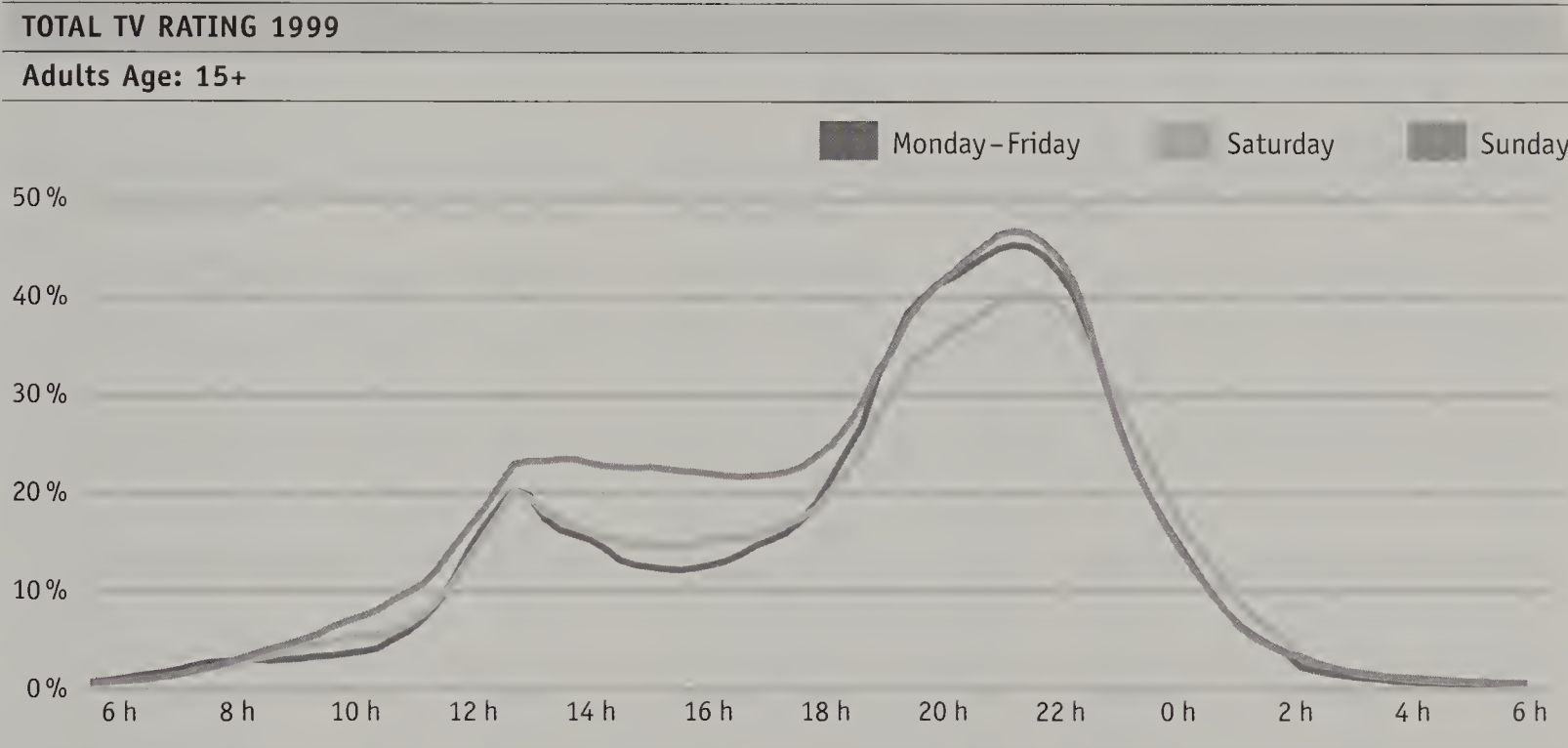
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
OESJE!	Belgium	Movie	24/04	21:16	98	11.7%	29.6%
TWISTER	USA	Movie	06/10	20:31	120	8.2%	17.1%
DIE HARD WITH A VENGEANCE	USA	Movie	15/05	21:34	133	7.6%	23.5%
THE FACE	USA	Movie	27/09	21:11	104	7.6%	17.3%
COMING TO AMERICA	USA	Movie	06/04	21:04	125	7.5%	17.3%
THE NUTTY PROFESSOR	USA	Movie	06/11	21:17	103	7.5%	18.9%
THE ROCK	USA	Movie	02/10	21:04	146	7.4%	21.1%
A FIGHT FOR JUSTICE	USA	Movie	21/12	21:09	101	7.3%	16.5%
BITTER BLOOD	USA	Movie	19/04	21:02	167	7.1%	19.2%
ABDUCTION OF INNOCENCE	USA	Movie	12/04	21:05	100	6.8%	14.7%

Source: AUDIMETRIE CIM NORTH-1999-ADULTS 15+

Viewing Patterns – South Belgium

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	N.V. AUDIMETRIE S.A.
Panel/Sampling Size	1 500 (750 South–750 North)
Instrument used (people-meter, telefon, face-to-face)	People-meter AGB 9400/5
	Population size in 000
Individuals 4+	3 912
Adults 15+	3 342
Main Purchase Responsibles 15+	1 873
Young Adults 15–34	1 098
Children 4–14	570

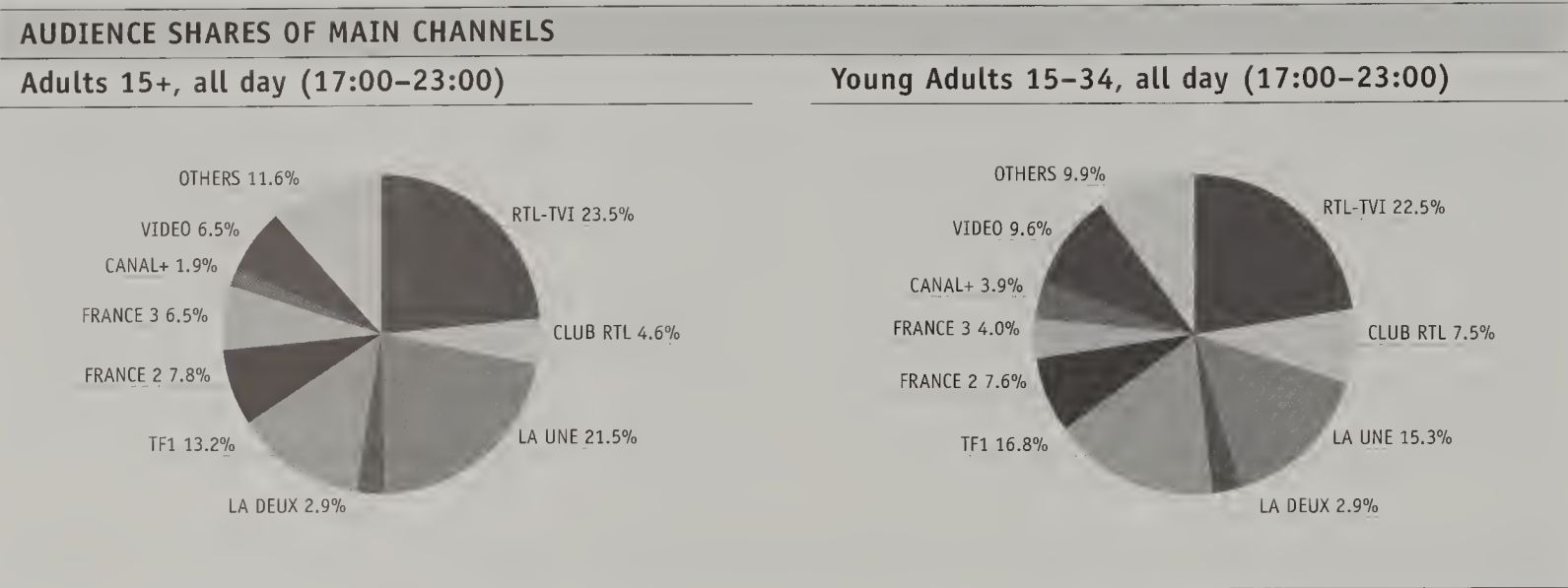
Source: Audimétrie CIM North 1999



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 15+			Children 4–14			Young Adults 15–34			Main Purchase Responsibles (15+)		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	70.4	70.8	71	59.5	59.1	58.2	60.3	59.8	59.1	74.3	75.1	75.4
Viewing time per Viewer	285	295	292	199	203	188	238	245	240	303	318	310
Viewing time per Individual	200	209	208	118	120	109	143	147	141	225	239	233

Source: Audimétrie CIM South–Monday–Sunday–Reach=1sec

Audience Shares – South Belgium



AUDIENCE SHARES OF MAIN CHANNELS/ALL DAY 17:00 – 23:00								
	Adults 15+		Young Adults 15–34		Children 4–14*		Main Purchase Responsibles (15+)	
	1998	1999	1998	1999	1998	1999	1998	1999
RTL-TVI	24.6%	23.5%	21.9%	22.5%	14.0%	16.9%	25.5%	23.8%
CLUB RTL	4.7%	4.6%	6.8%	7.5%	28.6%	24.1%	4.4%	4.3%
LA UNE	21.1%	21.5%	16.5%	15.3%	9.7%	9.4%	21.3%	22.1%
LA DEUX	2.7%	2.9%	2.6%	2.9%	5.2%	5.7%	2.5%	2.8%
TF1	13.1%	13.2%	16.5%	16.8%	11.4%	11.2%	13.1%	13.0%
FRANCE 2	7.7%	7.8%	7.7%	7.6%	5.4%	4.9%	7.8%	7.9%
FRANCE 3	6.6%	6.5%	3.8%	4.0%	2.8%	3.5%	6.8%	6.6%
CANAL +	2.0%	1.9%	4.0%	3.9%	1.4%	1.7%	1.6%	1.7%
VIDEO	6.0%	6.5%	8.9%	9.6%	10.9%	11.2%	5.4%	6.1%
OTHERS	11.5%	11.6%	11.3%	9.9%	10.6%	11.4%	11.6%	11.7%

Source: Audimetrie CIM South

*all day children: 16:00–20:30

AUDIENCE SHARES OF MAIN CHANNELS/BY DAY PARTS						
	Adults 15+		Young Adults 15–34		Main Purchase Responsibles (15+)	
	Day Time 17–19 h	Prime Time 19–22 h	Day Time 17–19 h	Prime Time 19–22 h	Day Time 17–19 h	Prime Time 19–22 h
RTL-TVI	19.5%	26.4%	19.2%	25.0%	19.9%	26.6%
CLUB RTL	3.8%	5.1%	8.0%	8.5%	3.3%	4.8%
LA UNE	18.5%	24.5%	11.4%	17.1%	19.5%	25.0%
LA DEUX	2.7%	2.8%	3.2%	2.7%	2.6%	2.6%
TF1	13.4%	11.3%	20.9%	13.9%	13.4%	11.2%
FRANCE 2	7.7%	6.6%	8.2%	6.3%	7.4%	6.8%
FRANCE 3	9.5%	4.9%	3.8%	3.7%	9.8%	5.0%
CANAL +	1.3%	2.4%	2.7%	4.9%	1.1%	2.1%
VIDEO	7.7%	6.0%	10.8%	9.0%	7.5%	5.5%
OTHERS	15.9%	10.0%	11.8%	8.9%	15.5%	10.4%

Source: Audimetrie CIM South/1999

Top Programmes all Channels – South Belgium

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
TELEVISION NEWS	Belgium	LA UNE	News	19:30	08/02	24.1%	49.6%
MOST BEAUTIFUL JOB IN THE WORLD	France	LA UNE	Movie	20:19	01/03	23.5%	45.0%
NEWS 19 HOURS	Belgium	RTL TVI	News	19:00	08/02	22.6%	51.5%
SHOWGIRLS	USA	LA UNE	Movie	20:23	08/02	21.4%	41.1%
HELP KOSOVO	Belgium	RTL TVI*	Variety Show	20:12	18/05	19.0%	44.2%
BLOOPERS	Belgium	RTL TVI	Comedy Show	20:05	28/12	19.8%	39.1%
EXTREME MEASURE	USA	LA UNE	Movie	20:27	06/12	19.4%	38.1%
CRITICAL DECISION	USA	RTL TVI	Movie	20:16	07/01	18.5%	37.5%
FAIR GAME	USA	RTL TVI	Movie	20:16	21/01	18.4%	38.7%
STOLEN YOUTH	USA	LA UNE	Movie	20:21	17/05	18.4%	38.4%
THE END OF THE EDEN	USA	LA UNE	Movie	20:20	11/01	18.1%	36.4%
SEVEN	USA	RTL TVI	Movie	20:08	11/11	18.0%	37.3%
IN THE NAME OF LAW	Belgium	LA UNE	Magazine	20:15	20/01	17.6%	37.4%
INDEPENDENCE DAY	USA	RTL TVI	Movie	20:04	28/10	17.5%	38.3%
BALDI AND TINI	Fra./Belg.	LA UNE	Movie	20:20	04/10	17.5%	36.1%
CON AIR	USA	RTL TVI	Movie	20:08	09/12	17.4%	36.2%
WING OR TIGHT	France	LA UNE	Movie	20:21	30/08	17.2%	37.0%
KOMMISSAR REX	Germany	RTL TVI	Series–Crime	20:08	08/01	17.0%	38.5%
THE GLIMMER MAN	USA	RTL TVI	Movie	20:11	18/11	16.9%	35.6%
BELGIUM IN PARTY	Belgium	RTL TVI	Magazine	19:39	02/12	16.9%	36.3%

Source: AUDIMETRIE CIM SOUTH–1999–ADULTS 15+

*+ LA UNE

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
MOST BEAUTIFUL JOB IN THE WORLD	France	LA UNE	20:19	01/03	23.5%	45.0%
SHOWGIRLS	USA	LA UNE	20:23	08/02	21.4%	41.1%
EXTREME MESURE	USA	LA UNE	20:27	06/12	19.4%	38.1%
CRITICAL DECISION	USA	RTL TVI	20:16	07/01	18.5%	37.5%
FAIR GAME	USA	RTL TVI	20:16	21/01	18.4%	38.7%
STOLEN YOUTH	USA	LA UNE	20:21	17/05	18.4%	38.4%
THE END OF THE EDEN	USA	LA UNE	20:20	11/01	18.1%	36.4%
SEVEN	USA	RTL TVI	20:08	11/11	18.0%	37.3%
INDEPENDENCE DAY	USA	RTL TVI	20:04	28/10	17.5%	38.3%
BALDI AND TINI	Fra./Belg.	LA UNE	20:20	04/10	17.5%	36.1%

Source: Audimetrie CIM South–1999–Adults 15+

TOP 10 SPORT EVENTS						
Title	Channel		Start.Time	Date	Audience	Share
FBAL BELGIUM–MAROCCO	LA DEUX		20:48	07/09	15.6%	34.2%
FBAL THE NETHERLANDS–BELGIUM	LA UNE		20:32	04/09	13.3%	34.4%
FBAL BELGIUM–EGYPT	LA DEUX		19:59	30/03	11.7%	24.8%
FBAL (UEFA FIN.): MANCHESTER–BAYERN MUNICH	LA UNE		20:45	26/05	11.2%	27.1%
FBAL ITALY–BELGIUM	LA UNE		20:50	13/11	11.1%	25.5%
CYCLING:LIEGE–BASTOGNE-LIEGE	LA UNE		14:06	18/04	10.1%	35.1%
FBAL BELGIUM–FINLAND	LA DEUX		20:02	18/08	9.9%	22.3%
FBAL ENGLAND–BELGIUM	LA UNE		16:01	10/10	9.4%	33.7%
FBAL BELGIUM–CZECH REPUBLIC	LA DEUX		20:00	09/02	9.0%	18.9%
FBAL LIERSE–STANDARD	LA UNE		16:17	30/05	8.7%	39.0%

Source: AUDIMETRIE CIM SOUTH–1999–ADULTS 15+

Top Programmes Channel by Channel – South Belgium

RTL TVI							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NEWS 19 HOURS	Belgium	News	362	19:00	20	16.0%	48.2%
KOMMISSAR REX	Germany	Series–Crime	15	20:10	50	14.3%	34.4%
ROYAL PLACE	Belgium	Magazine	38	20:10	25	13.5%	35.6%
SMILE, YOU ARE FILMED	Belgium	Comedy Show	4	20:00	50	12.4%	27.9%
IF IT WERE YOU	Belgium	Comedy Show	6	20:10	50	12.4%	27.2%
STAR TONIGHT	Belgium	Game Show	36	20:00	75	11.4%	26.3%
I’M STILL LAUGHING	Belgium	Comedy Show	4	20:00	60	10.9%	23.6%
WHAT ELSE!	Belgium	Comedy Show	6	20:00	70	10.9%	24.3%
DAY AFTER DAY	France	Magazine	4	20:00	140	10.7%	22.2%
COLUMBO	USA	Series–Crime	4	20:45	90	10.7%	26.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
BLOOPERS	Belgium	Comedy Show	28/12	20:05	53	19.8%	39.1%
CRITICAL DECISION	USA	Movie	07/01	20:16	131	18.5%	37.5%
FAIR GAME	USA	Movie	21/01	20:16	88	18.4%	38.7%
SEVEN	USA	Movie	11/11	20:08	122	18.0%	37.3%
INDEPENDENCE DAY	USA	Movie	28/10	20:04	143	17.5%	38.3%
CON AIR	USA	Movie	09/12	20:08	115	17.4%	36.2%
BELGIUM IN PARTY	Belgium	Magazine	02/12	19:39	81	16.9%	36.3%
THE GLIMMER MAN	USA	Movie	18/11	20:11	89	16.9%	35.6%
GOLDENEYE	USA	Movie	04/02	20:11	130	16.5%	34.0%
PRIMAL FEAR	USA	Movie	02/09	20:05	126	16.5%	37.6%

Source: AUDIMETRIE CIM SOUTH–1999–ADULTS 15+

CLUB RTL							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE SIMPSONS	USA	Cartoon	260	19:55	24	3.2%	7.7%
MAGIC OF DAVID COPPERFIELD	USA	Variety Show	4	22:24	50	2.6%	8.3%
AT ALL COSTS	Belgium	Magazine	41	19:56	29	2.3%	5.7%
THE AVENGERS	UK	Series–Crime	9	19:23	50	2.2%	5.7%
FRIENDS	USA	Daily Soap	158	19:16	23	2.1%	5.4%
RENDEZVOUS	Belgium	Magazine	33	22:26	27	1.9%	5.4%
E = M6	France	Magazine	52	22:28	23	1.8%	5.0%
UNIVERSITY’S YEARS	France	Series–Family	22	18:47	23	1.7%	5.2%
CHIPS	USA	Series–Crime	52	18:05	51	1.6%	5.9%
ALF	USA	Series–Comedy	52	18:58	27	1.6%	4.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE CRACKS	Fra./Italy	Movie	15/11	20:32	99	7.2%	14.5%
THE BATTLE OF THE BULGE	USA	Movie	14/12	20:29	135	5.9%	12.2%
THE HUNCH-BACKED	France	Movie	08/11	20:31	103	5.6%	11.6%
ENTER THE DRAGON	USA/*	Movie	20/07	20:30	97	5.6%	14.4%
NURSES ON THE LINE	USA	Movie	01/02	20:29	91	5.5%	11.0%
RAMBO	USA	Movie	16/03	20:30	94	5.5%	11.5%
DRAGON, THE BRUCE LEE STORY	USA	Movie	02/03	20:29	119	5.3%	10.6%
GONE WITH THE WIND	USA	Movie	17/02	20:30	214	5.2%	13.1%
UP PERISCOPE	USA	Movie	17/08	20:29	110	5.2%	12.2%
ALI BABA AND THE 40 THIEVES	France	Movie	30/06	20:29	92	4.9%	12.7%

Source: AUDIMETRIE CIM SOUTH–1999–ADULTS 15+

*Hong-Kong

LA UNE							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NEWS	Belgium	News	363	19:30	33	17.1%	44.2%
CALL FOR WITNESS	Belgium	Magazine	10	20:21	52	13.4%	28.5%
STRIPTEASE	Belgium	Magazine	8	20:18	59	12.2%	25.3%
BRAINS	Belgium	Game Show	33	20:18	65	11.7%	24.8%
NEWS ITEM	Belgium	Magazine	9	20:19	62	11.3%	24.0%
IN THE NAME OF THE LAW	Belgium	Magazine	8	20:19	69	11.3%	24.7%
DIRECT QUESTIONS	Belgium	Debates	4	20:05	40	11.2%	26.9%
JULIE LESCAUT	France	Series–Crime	26	20:49	92	10.8%	23.4%
EXTRAORDINARY GARDEN	Belgium	Magazine	50	20:14	30	10.4%	24.0%
AS FAR AS YOU KNOW	Belgium	Magazine	48	20:18	22	10.2%	23.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MOST BEAUTIFUL JOB*	France	Movie	01/03	20:19	100	23.5%	45.0%
SHOWGIRLS	USA	Movie	08/02	20:23	125	21.4%	41.1%
EXTREME MEASURE	USA	Movie	06/12	20:27	113	19.4%	38.1%
STOLEN YOUTH	USA	Movie	17/05	20:21	82	18.4%	38.4%
THE END OF THE EDEN	USA	Movie	11/01	20:20	87	18.1%	36.4%
BALDI AND TINI	Fra./Belg.	Movie	04/10	20:20	84	17.5%	36.1%
WING OR TIGHT	FR	Movie	30/08	20:21	100	17.2%	37.0%
DIDIER	FR	Movie	29/03	20:26	100	16.7%	34.0%
LUCIE AUBRAC	FR	Movie	10/05	20:28	111	16.0%	32.6%
RALPH SUPER KING	USA	Movie	29/11	20:22	91	15.4%	31.0%

Source: AUDIMETRIE CIM SOUTH–1999–ADULTS 15+

*IN THE WORLD

LA DEUX							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
CYCLE RACE TOUR OF FRANCE	Belgium	Sport	4	10:46	350	3.5%	20.2%
ALLY MCBEAL (V.O.)	USA	Series–General	33	20:13	42	1.9%	4.6%
SPORTING WEEKEND	Belgium	Sport	12	23:12	52	1.9%	9.7%
THE FIELDS’ KEY	Belgium	Magazine	7	20:15	22	1.6%	3.6%
NAMES OF GODS	Belgium	Magazine	8	20:50	55	1.4%	2.8%
BEGIAN’S YEARS (R)	Belgium	Magazine	8	20:54	50	1.3%	2.8%
PULSATIONS (R)	Belgium	Magazine	8	20:59	57	1.3%	2.7%
LATE EVENING NEWS	Belgium	News	354	22:41	22	1.3%	4.3%
GARDENS AND LEISURES (R)	Belgium	Magazine	40	22:11	20	1.2%	3.3%
GREY MATTER (OF THE BRAIN) (R)	Belgium	Magazine	8	21:03	53	1.2%	2.9%

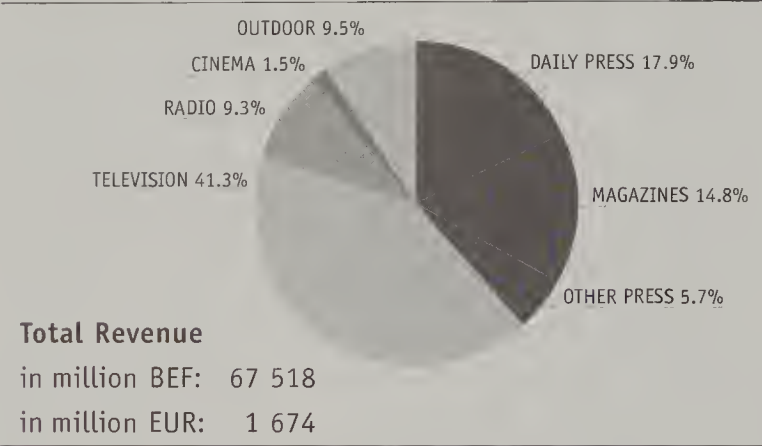
Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL BELGIUM–MAROCCO	Sport	07/09	20:48	110	15.6%	34.2%
FBAL BELGIUM–EGYPT	Sport	30/03	19:59	112	11.7%	24.8%
FBAL BELGIUM–FINLAND	Sport	18/08	20:02	114	9.9%	22.3%
FBAL BELGIUM–CZECH REPUBLIC	Sport	09/02	20:00	109	9.0%	18.9%
FBAL CYPRUS–BELGIUM	Sport	03/02	20:00	116	8.6%	17.1%
FBAL ROMANIA–BELGIUM	Sport	28/04	19:32	111	8.4%	18.9%
FBAL MANCHESTER–JUVENTUS	Sport	07/04	20:45	112	8.2%	17.1%
FBAL GREECE–BELGIUM	Sport	05/02	19:58	112	7.7%	16.5%
FBAL BELGIUM–BULGARIA	Sport	27/03	19:59	113	7.5%	17.8%
FBAL MILAN–MANCHESTER	Sport	17/03	20:45	115	6.6%	14.0%

Source: AUDIMETRIE CIM SOUTH–1999–ADULTS 15+

Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million BEF)	67 518
Total adspend (in million USD)	1 657
Total adspend (in million EUR)	1 674
TV adspend (in million BEF)	27 868
TV adspend (in million USD)	685
TV adspend (in million EUR)	691
TV adspend in % of GDP	0.34
TV adspend per capita (USD)	67.1

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

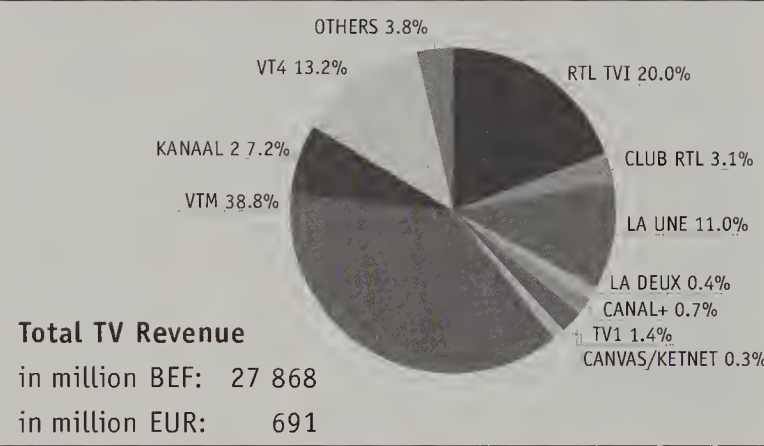


Source: MDB 99-TV Sponsoring included

TV ADVERTISING STATISTICS	
Total number of spots broadcast	288 601
Average spot length (in sec.)	26.0
Total number of advertisers	5 055
Number of TV advertisers	935
Total number of advertised products	8 700
Number products advertised on TV	1 660

Source: MDB 99/Commercial/TV sponsoring included

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
FOOD-DRINKS	11 112	7 144	64.3%	25.6%
CULTURE-TOURISM-LEISURE	12 476	5 517	44.2%	19.8%
BEAUTY-HYGIENE	5 468	3 900	71.3%	14.0%
CLEANING PRODUCTS	3 259	3 081	94.5%	11.1%
SERVICES	7 386	1 809	24.5%	6.5%
TRANSPORT	8 703	1 753	20.1%	6.3%
TELECOM	5 488	1 334	24.3%	4.8%
EQUIPMENT (HOUSE AND OFFICE)	6 423	1 093	17.0%	3.9%
HEALTH	1 294	892	68.9%	3.2%
CLOTHES	2 828	502	17.7%	1.8%
OTHER	3 081	843	27.4%	3.0%
TV Advertisers				
PROCTER & GAMBLE BENELUX	3 031	2 894	95.5%	10.4%
UNILEVER	2 347	1 948	83.0%	7.0%
L'OREAL GROUP	1 490	1 082	72.6%	3.9%
DANONE GROUP	1 185	1 044	88.1%	3.7%
HENKEL	911	823	90.3%	3.0%
COCA-COLA SOFT DRINKS S.A	929	680	73.2%	2.4%
PHILIP MORRIS GROUP	728	551	75.7%	2.0%
MASTER FOODS	636	548	86.2%	2.0%
ETAT BELGE	1 340	482	36.0%	1.7%
INTERBREW BELGIUM	611	435	71.3%	1.6%
OTHER	54 310	17 381	32.0%	62.4%
Total (in million BEF)	67 518	27 868	41.3%	100.0%
Total (in million EUR)	1 674	691	41.3%	100.0%

Source: MDB 99-Sponsoring included

Denmark

Four main media players compete on the Danish TV-Market in 2000. They are Danmarks Radio, TV 2, Viasat Broadcasting and SBS. The four players supply a total of seven channels. Danmarks Radio runs two non-commercial channels, DR 1 and DR 2. TV 2 is partly ad and licence based, and has public service obligations. Viasat Broadcasting owns two commercial TV-stations, TV3 and 3+, while SBS now runs TvDanmark1 and TvDanmark2 (TvDanmark1 started the 1st of January 2000). These seven channels command a share of viewing of 88%, which leaves 12% to satellite viewing, viewing on neighbouring country channels and local Danish TV-stations.

1999 saw large increases in satellite penetration. TV3/3+ gained 5 % more penetration. It is yet unclear what will happen in 2000, but a reasonable estimate of satellite penetration (dish/cable) would be 75% of the Danish population.

Danish law prohibits national TV-stations from using commercial breaks. Only advertising placed between programmes is allowed. At the same time, advertisements for tobacco, liquor and pharmaceutical products (OTC) are prohibited. In addition, ads aimed at children will be somewhat limited on Danish-based TV from the year 2001. TV3, 3+ and TvDanmark1 are broadcast from London under ITC regulation, which in general terms are more flexible.

The main trends in 1999

The most unforeseen event in 1999 was the smaller players, DR2 and 3+, who continued to gain shares. The continued success of channel 3+ was mainly contributed to their ownership of the rights to broadcast Danish Premier Football, while DR2 benefited from rising penetration based on its must carry status.

TV 2's struggle with falling shares and income also turned surprisingly serious. The problems evolved from a continuous failure to attract an adequate share of younger viewers. During the autumn, the problem was corrected, as TV 2 placed US shows such as „Ally Mcbeal“ and „Friends“ in primetime and quickly regained some of its lost ground.

TV3 and 3+ had a fairly good year and a strong fourth quarter, as the „Robinson“ docu-drama became an even greater success in its second season.

SBS entered 1999 with the momentum built in the previous two years, but lost some of its attraction with viewers in the autumn.

The advertiser market

The advertising income on television was split three ways: TV 2 attracted 62% of TV spending. TV3 and 3+ 27% and TvDanmark 11%.

As TV 2 has a more matured audience then TV3, 3+ and the two SBS channels, it attracts sectors such as finance, cars, insurance and housing goods. On the other hand, TV3/3+, which has a much younger audience, attracts advertisers such as the music industry, dot.com companies, and products like crisps, snacks and beverages.

At the beginning of 2000, the CPT has dropped quite a lot on all channels, which seems to have a severe effect on the market share. SBS is losing a substantial percentage to both TV 2 and TV3/3+. Evidently the risk of short supply has increased, which again will affect the CPT.

Entering the new millennium

Gallup A/S (AGB) introduced an improved TV survey, doubling meter households to 1000 households as of January 1st 2000. This supported more reliable data and enabled the market to work with more detailed material.

The media scene in Denmark shows vitality for 2000. SBS introduced TvDanmark1 on January 1st, but the two-channel strategy initially turned into a major failure, as SBS' share, in spite of two channels, dropped from last year's level. SBS took a long hard look at its programming strategy in the spring of 2000 and re-launched.

The programme theme for autumn 2000 seems to be Danish drama with DR1, TV2 and TV3 all planning to launch ambitious Danish language drama series.

TV 2 is to add an 8th player to a crowded market. A youth oriented new sister station is in the works and expected to launch on October 15. TV 2 has chosen a rather unusual brand name for the newcomer – „TV2 Zulu“ – which will enable TV 2 to aim programming on the new channel more effectively at the 15 to 40 age bracket.

A digital television package is already available to Danish viewers on cable and from Canal+ and Viasat's digital satellite platforms. Public broadcasters are currently testing terrestrial digital distribution. It is expected that three to four multiplexes with limited selection will be available to viewers with the right equipment in 2001.

Denmark

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Sources: Annual Survery (Gallup) and Danmarks Statistisk

Sources: Danmarks Statistisk and Ministry of Economy *December 1999

Sources: Annual Survey/Gallup

¹ SES/ASTRA

Source: Gallup A/S – a part of Taylor Nelson Sofres Plc, annual survey

Source: Gallup A/S – a part of Taylor Nelson Sofres Plc, annual survey

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
DISCOVERY	Private	C, S	53%	English/sub. danish	Documentaries	Adv.
MTV	Private	C, S	43%	English	Music	Adv.
CNN (GB)	Private	C, S	48%	English	News	Adv.
BBC PRIME	Public	C, S	41%	Danish/English	Entertainment	Adv.
EUROSPORT	Private	C, S	56%	English/Danish	Sport	Adv.
TNT/CARTOON	Private	C, S	33%	English	Movies/Children	Adv.
ANIMAL PLANET	Private	C, S	30%	English	Nature/Documentaries	Adv.
NAT. GEOGRAFIC	Private	C, S	30%	English	Nature/Documentaries	Adv.

Source: Gallup A/S – a part of Taylor Nelson Sofres Plc, annual survey

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
SVT 1	Public	T, C	54%	Swedish	Generalist	L-F
SVT 2	Public	T, C	53%	Swedish	Generalist	L-F
TV 4	Public/Private	T, C, S	50%	Swedish	Generalist	Adv.
NRK 1	Public	T, C	41%	Norwegian	Generalist	L-F
TV 2	Public	T, C	53%	Norwegian	Generalist	L-F, Adv.
TV 3	Private	C, S	13%	Norwegian	Generalist	Adv.
ARD	Public	T, C, S	50%	German	Generalist	L-F, Adv.
ZDF	Public	T, C, S	45%	German	Generalist	L-F, Adv.
N3	Public	T, C, S	44%	German	Generalist	L-F, Adv.
RTL	Private	C, S	50%	German	Generalist	Adv.
SAT 1	Private	C, S	33%	German	Generalist	Adv.

Source: Gallup A/S – a part of Taylor Nelson Sofres Plc, annual survey

PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Revenue	Sales House
TV 1000	1992	C, S	n.a.	Engl./sub. Danish	168	Movies, Sportn.	Subscription	No sales
TV 1000 CINEMA	1993	C, S	n.a.	Engl./sub. Danish	168	Movies, Sportn.	Subscription	No sales
CANAL PLUS	1997	C, S	n.a.	Engl./sub. Danish	168	Movies, Sportn.	Subscription	No sales
CANAL PLUS YELLOW	1997	C, S	n.a.	Engl./sub. Danish	168	Movies, Sportn.	Subscription	No sales
CANAL PLUS BLUE	n.a.	n.a.	n.a.	n.a.	n.a.	Movies, Series	n.a.	n.a.

Source: Viasat Broadcasting A/S

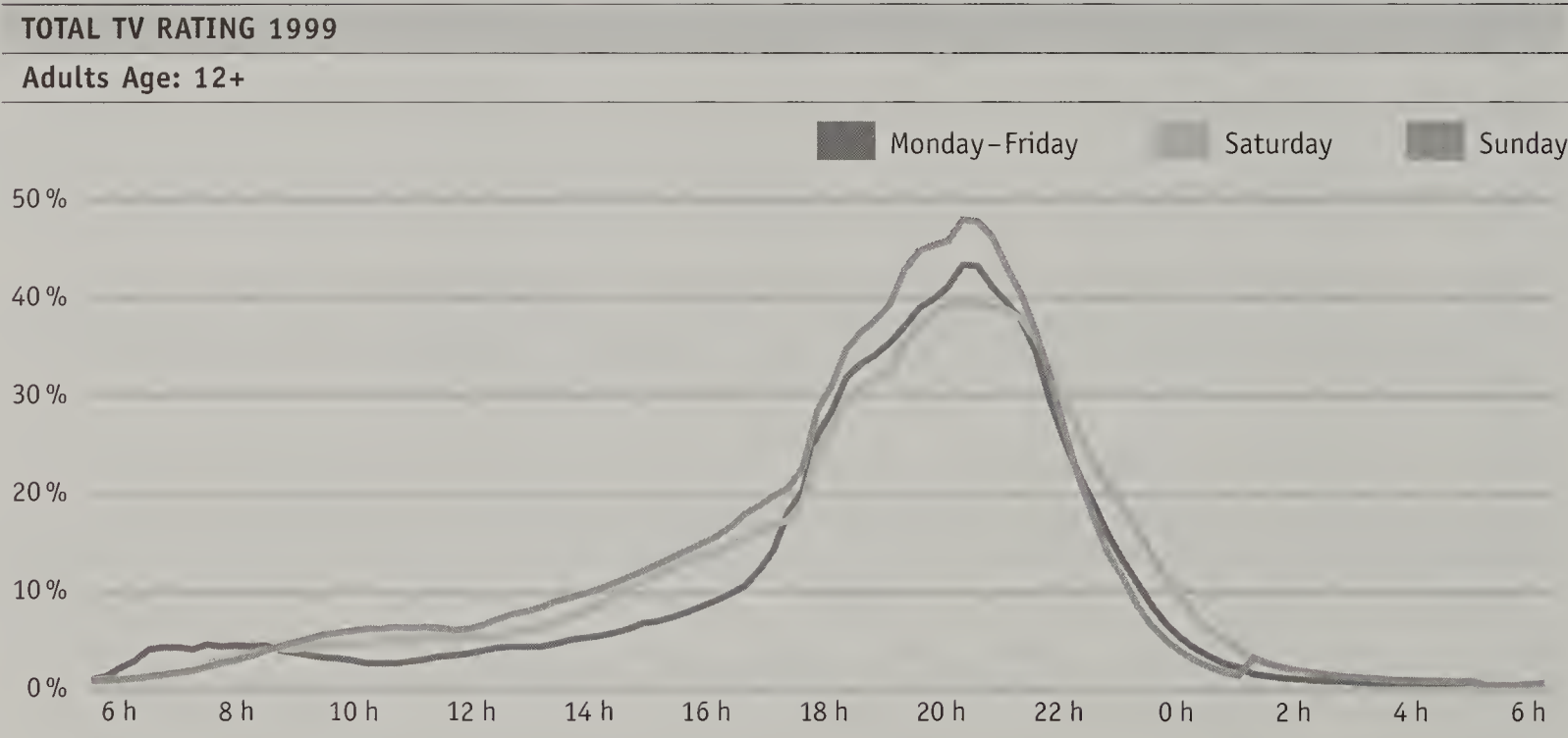
DIGITAL PACKAGES								
Channels	Launch	Diff.	Decoder	Subscr.	Language	No.of ch.	Revenue	Cost/month
CANAL PLUS	1998	S	NOKIA	n.a.	Dan./Engl.	n.a.	Sub.	n.a.
CANAL PLUS DIGITAL	Oct. '98	S	Nokia & Philips	n.a.	Dan./Engl.	n.a.	Sub.	n.a.

Source: Canal+ Danmark

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	Gallup A/S – a part of the Taylor Nelson Sofres Plc
Panel/ Sampling Size	1 000 households*
Instrument used (people-meter, telefon, face-to-face)	People-meter
Population size in 000	
Individuals 4+	5 034
Adults 12+	4 513
Housewives 19–50	1 284
Young Adults 12–30	1 273
Children 4–11	521

*from the 1th of jan. 2000/500 households in 1999

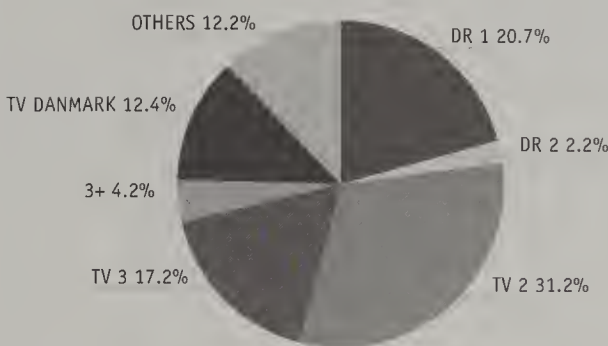
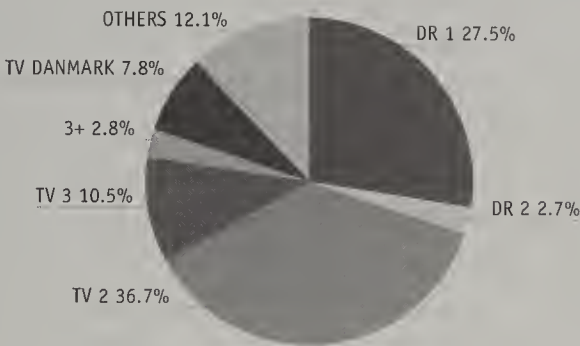


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 12+			Children 4–11			Young Adults 12–30			Housewives 19–50		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	75.2	77.0	75.0	70.6	70.7	67.1	69.6	71.6	69.9	74.2	76.7	74.4
Viewing time per Viewer	215	221	220	135	136	140	197	205	209	205	214	216
Viewing time per Individual	162	170	165	95	96	94	137	147	146	152	164	161

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS	
Adults 12+, all day (02:00 – 02:00)	Young Adults 12 – 30, all day (02:00–02:00)



AUDIENCE SHARES OF MAIN CHANNELS/ ALL DAY 02:00 – 02:00								
	Adults 12+		Young Adults 12–30		Children 4–11		Housewives 19–50	
	1998	1999	1998	1999	1998	1999	1998	1999
DR 1	29.0%	27.5%	22.6%	20.7%	37.3%	37.3%	26.8%	24.5%
DR 2	1.8%	2.7%	1.7%	2.2%	0.6%	0.8%	2.2%	2.8%
TV 2	38.4%	36.7%	33.9%	31.2%	31.1%	27.7%	34.8%	32.6%
TV 3	10.2%	10.5%	15.1%	17.2%	12.4%	12.6%	12.6%	14.9%
3+	1.7%	2.8%	2.5%	4.2%	1.0%	1.9%	2.0%	3.2%
TV DANMARK	7.4%	7.8%	11.5%	12.4%	7.2%	6.0%	9.7%	10.3%
OTHER	11.5%	12.1%	12.7%	12.2%	10.5%	13.7%	12.0%	11.9%

AUDIENCE SHARES OF MAIN CHANNELS/ BY DAY PARTS								
	Adults 12+		Young Adults 12–30		Children 4–11		Housewives 19–50	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	12–18h	20–23h	12–18h	20–23h	12–18h	20–23h	12–18h	20–23h
DR 1	18.2%	34.2%	15.3%	23.9%	35.5%	31.2%	16.0%	29.9%
DR 2	1.4%	3.8%	1.1%	3.4%	0.4%	2.1%	1.4%	4.1%
TV 2	29.6%	34.3%	30.9%	31.9%	23.2%	37.8%	26.5%	32.2%
TV 3	13.4%	10.4%	17.4%	17.9%	10.8%	12.8%	19.1%	14.5%
3+	4.1%	2.3%	4.6%	3.5%	2.1%	2.5%	4.1%	2.8%
TV DANMARK	14.5%	6.3%	14.7%	10.8%	4.7%	6.1%	16.6%	8.7%
OTHER	18.8%	8.6%	16.0%	8.5%	23.3%	7.5%	16.4%	7.9%

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
HBAL W.CHMP DENM.-FRANCE	Denmark	TV 2	Sport	20:35	09/12	39.1%	73.4%
BIG CLASS MEETING		TV 2	Entertain.	20:47	19/12	34.9%	66.3%
HBAL W.CHMP 1/8 FINALS		TV 2	Sport	20:35	07/12	33.4%	66.9%
FBAL EU CHMP ITALY-DENM.		TV 2	Sport	20:36	08/09	33.0%	72.6%
TAXI	Denmark	DR 1	Series-General	20:00	12/12	32.8%	58.7%
WHO WANTS TO BE A MILLIONAIRE?	Denmark	TV 2	Quiz	20:07	13/10	32.6%	75.6%
MORTEN KORCH	Denmark	TV 2	Series-General	20:06	24/02	32.4%	70.6%
TAXI	Denmark	DR 1	Series-General	20:00	31/10	32.4%	59.9%
FBAL DENMARK-ISRAEL	Denmark	TV 2	Sport	19:07	17/11	32.4%	67.9%
THOMAS EJE SHOW		DR 1	Entertain.	20:02	02/01	31.6%	59.8%
MORTEN KORCH		TV 2	Series-General	20:06	03/03	31.1%	68.3%
TAXI		DR 1	Series-General	20:00	14/11	30.7%	59.3%
TAXI	Denmark	DR 1	Series-General	20:00	21/11	30.4%	60.4%
NEWS 19:00	Denmark	TV 2	News	19:00	19/02	29.9%	74.1%
BIG CLASS MEETING	Denmark	TV 2	Entertain.	20:46	19/03	29.6%	56.5%
BIG CLASS MEETING	Denmark	TV 2	Entertain.	20:49	26/02	29.5%	59.7%
GRAND PRIX 1999 NAT. CONTEST	Denmark	DR 1	Variety Show	20:36	13/03	29.5%	58.1%
STATION 2	Denmark	TV 2	Magazine	20:38	22/02	29.4%	57.2%
TAXI	Denmark	DR 1	Series-General	20:00	24/10	29.0%	58.2%
SPECIAL THOMAS MYGIND	Denmark	TV 3	Magazine	21:40	29/11	29.0%	51.9%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
OLSENBANDEN PÅ SPORET	Denmark	DR 1	20:43	01/01/2000	27.2%	45.0%
BALLADE PÅ CHRISTIANSHAVN	Denmark	DR 1	21:03	03/04	25.8%	60.9%
NYHAVNS GLADE DRENGE	Denmark	TV 2	20:05	28/02	25.5%	46.0%
BABYDOOM	Denmark	DR 1	21:04	24/04	23.8%	53.4%
SØMAND I KNIBE	Denmark	TV 2	20:04	11/04	23.5%	46.6%
DYRLÆGENS PLEJEBØRN	Denmark	TV 2	19:32	26/12	22.9%	53.3%
MIN SØSTERS BØRN	Denmark	DR 1	20:03	09/01	22.7%	47.7%
FRENCH KISS	USA	TV 2	20:06	31/01	22.7%	40.2%
FUNNY FARM	USA	TV 2	20:07	17/01	22.4%	39.3%
BOLETTES BRUDEFÆRD	Denmark	DR 1	20:02	16/01	22.2%	44.8%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
HBAL W.CHMP DENMARK-FRANCE		TV 2	20:35	09/12	39.1%	73.4%
HBAL W.CHMP 1/8 FINALS		TV 2	20:35	07/12	33.4%	66.9%
FBAL EU CHMP ITALY-DENMARK		TV 2	20:36	08/09	33.0%	72.6%
FBAL DENMARK-ISRAEL		TV 2	19:07	17/11	32.4%	67.9%
HBAL W.CHMP DENMARK-JAPAN		TV 2	20:37	01/12	28.6%	58.5%
HBAL W.CHMP DENMARK-GERMANY		TV 2	17:50	05/12	27.9%	69.1%
HBAL W.CHMP DENMARK-ARGENTINA		TV 2	20:37	02/12	27.8%	58.6%
FBAL EU CHMP DENMARK-ITALY		TV 2	19:07	27/03	27.3%	61.2%
FBAL CROATIA-DENMARK		TV 2	20:19	10/02	26.9%	56.6%
HBAL W.CHMP FINALS		TV 2	17:45	12/12	26.1%	64.7%

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

Top Programmes Channel by Channel

DR1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TAXI	Denmark	Series-General	21	20:00	37	27.7%	52.8%
CRIMINAL MAGAZINE	Denmark	Magazine	21	20:40	20	20.4%	39.6%
HAMMERSLAG	Denmark	Entertainment	15	20:30	28	20.1%	49.3%
SUNDAY MAGAZINE	Denmark	Magazine	41	21:15	30	19.9%	40.7%
SPORLØS	Denmark	Magazine	10	20:30	27	18.8%	46.7%
TV-AVISEN	Denmark	News	310	21:00	25	17.4%	39.4%
TAXFREE SATURDAY	Denmark	Entertainment	14	20:00	60	17.3%	41.9%
FREDERIK	Denmark	Documentary	6	20:00	27	16.2%	34.7%
MONEY MAGAZINE	Denmark	Magazine	41	21:25	35	16.2%	37.5%
NEWS MAGAZINE	Denmark	Magazine	34	21:25	35	16.2%	38.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GRAND PRIX 1999 NAT. CONTEST	Denmark	Music	13/03	20:36	103	29.5%	58.1%
OLSENBANDEN PÅ SPORET	Denmark	Movie	1/1 '00	20:43	99	27.2%	45.0%
DISAPPEARED DANISH	Denmark	Magazine	18/02	20:01	27	26.3%	58.8%
BALLADE PÅ CHRISTIANSHAVN	Denmark	Movie	03/04	21:03	99	25.8%	60.9%
DISAPPEARED DANISH	Denmark	Magazine	04/02	20:01	27	25.2%	56.1%
HELP BALKAN	Denmark	Charity Show	18/04	20:00	117	25.0%	43.2%
BABYDOOM	Denmark	Movie	24/04	21:04	77	23.8%	53.4%
BRØDRENE RASMUSSENS EVENTYR	Denmark	Documentary	16/02	20:30	28	23.7%	52.3%
GRAND PRIX EUROVISION*	Europe	Variety Show	29/05	21:00	373	23.1%	63.9%
SPEECH OF STATS MINISTERENS	Denmark	n.a.	1/1 '00	19:15	13	22.9%	43.3%

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

*DE LA CHANSON 99

DR2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
HATTEN PÅ ARBEJDE	Denmark	Entertainment	12	21:45	30	2.6%	5.6%
HALF AN HOUR	Denmark	Entertainment	9	22:30	30	2.5%	7.3%
BODY MYSTERIES	Denmark	Documentary	7	20:50	40	2.4%	6.3%
WONDERFUL WEALTH	Denmark	Documentary	6	21:40	50	2.2%	7.0%
LOVESTORIES OF THE CENTURY	Denmark	Documentary	17	22:30	25	1.6%	5.0%
SUCESS STORIES	Denmark	Documentary	10	20:25	25	1.6%	3.7%
THE MUSICIANS	Denmark	Music	8	22:20	40	1.5%	5.2%
FORFÆNGELIGHEDENS MA.	n.a.	Series-General	6	20:40	50	1.5%	3.0%
CRIME HOUR	Denmark	Series-Crime	43	20:50	50	1.5%	3.6%
BERTELSEN	Denmark	Talkshow	25	22:30	25	1.3%	3.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FESTEN	Denmark	Movie	25/04	20:49	100	13.6%	29.0%
MIFUNES SIDSTE SANG	Denmark	Movie	30/12	19:57	96	12.8%	26.2%
IDIOTERNE	Denmark	Movie	02/05	20:48	108	10.9%	23.8%
SPEC.: GRAND PRIX DE LA CHANSON	Denmark	Entertainment	22/05	20:01	178	6.2%	20.8%
SECRETS AND LIES	USA	Movie	05/12	20:44	135	5.3%	12.7%
HEAVENS PRISONERS	USA	Movie	22/01	19:57	125	5.0%	11.2%
HISTORY OF ABBA	Denmark	Documentary	25/09	20:30	58	5.0%	12.5%
MUSIC AND THE MACHINE	Denmark	Entertainment	25/09	21:29	89	5.0%	12.9%
ROBINSON CRUSOE	USA	Movie	14/05	20:02	86	4.7%	12.2%
CHILDREN FBAL W.CHMP		Sport	27/06	21:51	122	4.4%	20.0%

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

TV 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
BIG CLASS MEETING	Denmark	Entertainment	20	20:50	55	26.8%	57.4%
MORTEN KORCH	Denmark	Series-General	13	20:00	30	24.5%	57.8%
WHO WANTS TO BE A MILLIONAIRE?	Denmark	Quiz	10	20:00	30	23.0%	59.2%
FINN'SK FJERNSYN	Denmark	Entertainment	12	20:05	25	22.4%	56.2%
STATION 2	Denmark	Magazine	20	20:40	40	20.4%	44.7%
NEWS 19:00	Denmark	News	366	19:00	25	19.9%	60.6%
STRIGLER OG BØRSTER	Denmark	Docu-Soap	6	20:05	25	19.8%	45.2%
OLSENBANDENS FØRSTE KUP	Denmark	Series-General	24	20:05	25	18.8%	43.2%
REGIONAL NEWS	Denmark	News	355	19:30	25	18.6%	52.4%
SOMEBODY AT HOME?	Denmark	Entertainment	13	20:40	40	16.3%	38.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
HBAL W.CHMP DENMARK-FRANCE	Denmark	Sport	09/12	20:35	107	39.1%	73.4%
HBAL W.CHMP 1/8 FINALS		Sport	07/12	20:35	90	33.4%	66.9%
FBAL EU.CHMP ITALY-DENMARK		Sport	08/09	20:36	137	33.0%	72.6%
FBAL DENMARK-ISRAEL		Sport	17/11	19:07	127	32.4%	67.9%
THOMAS EJE SHOW		Entertainment	2/1 '00	20:02	55	31.6%	59.8%
HBAL W.CHMP DENMARK-JAPAN		Sport	01/12	20:37	85	28.6%	58.5%
HBAL W.CHMP DENMARK-GERMANY		Sport	05/12	17:50	97	27.9%	69.1%
HBAL W.CHMP DENMARK-ARGENT.		Sport	02/12	20:37	88	27.8%	58.6%
FBAL EU.CHMP DENMARK-ITALY		Sport	27/03	19:07	131	27.3%	61.2%
FBAL CROATIA-DENMARK		Sport	10/02	20:19	131	26.9%	56.6%

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

TV 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
EXPEDITION ROBINSON	Denmark	Game Show	13	20:00	75	17.9%	37.2%
BOXING LIVE	Denmark	Sport	8	20:00	n.a.	9.2%	23.9%
TELE DANMARK SUPERSTARS '99	Denmark	Game Show/Sport	10	20:00	60	8.0%	18.0%
RENT FUP	Denmark	Entertainment	10	20:00	60	5.7%	11.8%
PERNILLES UNIVERSE	Denmark	Talkshow	30	21:50	55	5.2%	15.7%
GUINNESS REKORD-TV	Denmark	Entertainment	10	20:00	60	4.6%	10.3%
WANTED	Denmark	Magazine	30	20:00	55	4.5%	11.4%
DAWSON'S CREEK	USA	Series-General	28	20:55	55	4.1%	9.5%
E. R. (EMERGENCY ROOM)	USA	Series-General	22	20:00	55	4.0%	9.8%
DENISH MEN	Denmark	Docu-Soap	6	21:20	55	3.9%	9.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
SPECIAL THOMAS MYGIND	Denmark	Magazine	29/11	21:40	5	29.0%	51.9%
FBAL ISRAEL-DENMARK		Sport	13/11	18:53	118	19.0%	45.6%
FBAL UEFA CL THE FINALE		Sport	26/05	20:39	125	16.0%	40.4%
FBAL UEFA CL SEMIFINALE		Sport	07/04	20:40	114	11.5%	25.8%
FBAL UEFA CL SEMIFINALE		Sport	21/04	20:40	110	10.2%	23.9%
METRO	USA	Movie	29/11	21:48	125	10.0%	33.7%
CON AIR	USA	Movie	21/11	21:01	127	9.7%	24.2%
FBAL UEFA CL INTER-MAN.UNITED	USA	Sport	17/03	20:42	113	9.3%	22.7%
NOWHERE TO RUN		Movie	05/04	21:04	99	8.7%	20.0%
FBAL FAXE KON. LIG.: BRØNDBY-FCK		Sport	14/03	18:24	117	8.5%	19.8%

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

3 +							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
BOXING LIVE	Denmark	Sport	5	23:00	n.a.	2.3%	10.0%
WORTHINGTON CUP		Sport	5	20:40	120	1.5%	3.6%
FBAL UEFA CL – HIGHLIGHTS		Sport	21	n.a.	n.a.	1.2%	6.0%
ONSIDE – SPECIAL	Denmark	Sport Magazine	22	21:00	30	1.2%	2.6%
RINGSIDE	Denmark	Sport Magazine	25	21:50	120	1.2%	4.1%
THE SIMPSONS	USA	Cartoon	213	19:30	30	1.1%	3.1%
ENGLISH LIGA CUP	England	Sport	4	20:40	120	1.0%	2.5%
TENNIS: COPENHAGEN OPEN	Denmark	Sport	4	21:00	n.a.	1.0%	3.2%
HBAL ÅRDAL CUP	Denmark	Sport	5	n.a.	n.a.	0.9%	4.4%
NASH BRIDGES	USA	Series–Crime	43	21:40	50	0.8%	2.0%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL EU CHMP WALES-DENM.	Sport	09/06	20:17	119	12.0%	28.3%
FBAL FAXE KONDI LIGA: AAB-BRØNDBY	Sport	10/05	18:41	139	5.5%	13.8%
FBAL FAXE KONDI LIGA: FCK-BRØNDBY	Sport	28/05	18:41	140	4.7%	17.1%
FBAL UEFA CL MILAN-CHELSEA	Sport	26/10	20:30	125	4.6%	11.9%
FBAL UEFA CL FIORENTINA-MANCHESTER UNITED	Sport	23/11	20:32	123	4.5%	11.3%
FBAL UEFA CUP AAB-UDINESE	Sport	30/09	20:30	127	4.2%	11.3%
FBAL AB-AAB (FINALS)	Sport	13/05	15:01	129	4.1%	30.5%
FBAL UEFA CL ARSENAL-BARCELONA	Sport	19/10	20:30	132	4.0%	11.0%
FBAL SILKEB.-BRØNDBY	Sport	22/03	18:41	138	3.9%	9.1%
FBAL UEFA CL MILAN-GALATASARAY	Sport	21/09	20:30	127	3.7%	9.6%

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

TV DANMARK							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
BIKER JENS IN THE USA	Denmark	Travelmagazine	13	21:30	25	6.0%	14.9%
THE GIRLS OF THE STRIPPER KING 3	Denmark	Docu–Soap	11	20:55	25	5.1%	11.8%
THE GIRLS OF THE STRIPPER KING 2	Denmark	Docu–Soap	9	20:55	25	4.9%	11.1%
DET NY SYNNØVE	Denmark	Talkshow	12	22:00	40	4.5%	12.5%
SEX MODELLS	n.a.	Documentary	30	22:00	25	4.0%	10.8%
SYNDENS Ø	n.a.	Entertainment	8	22:30	30	3.6%	11.0%
EXTREME	n.a.	Documentary	43	20:40	25	3.4%	8.8%
48 HOURS	Denmark	Documentary	61	20:00	61	3.2%	8.1%
BANZAI	Denmark	Magazine	24	21:25	24	3.1%	7.9%
POLICE ON YOUR HEELS	n.a.	Series–Action	10	21:00	50	2.7%	5.9%

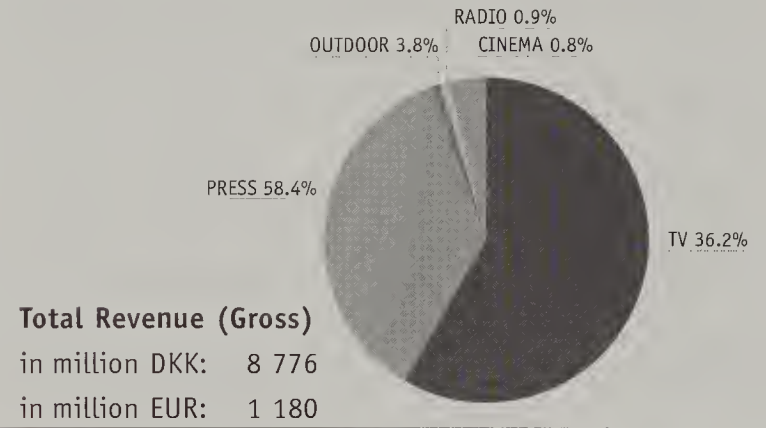
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE ROCK	USA	Movie	15/03	20:04	133	10.2%	20.0%
TRADING PLACES	USA	Movie	25/01	20:02	110	9.2%	18.5%
GOLDEN GIRLS	USA	Movie	18/01	20:04	88	9.1%	17.5%
THE FIRST WIVES CLUB	USA	Movie	26/11	20:03	99	8.0%	19.8%
PRIMAL FEAR	USA	Movie	03/05	20:03	125	7.6%	16.4%
SABRINA	USA	Movie	22/03	20:04	125	7.2%	14.8%
BREAKDOWN	USA	Movie	30/08	20:03	126	6.9%	16.8%
SOMETHING TO TALK ABOUT	USA	Movie	12/11	20:03	102	6.7%	15.4%
TRADING PLACES	USA	Movie	27/11	19:31	112	6.7%	17.0%
LAST DANCE	USA	Movie	24/05	20:05	98	6.1%	13.1%

Source: Gallup A/S – a part of the Taylor Nelson Sofres Plc

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million DKK)	8 776
Total adspend	(in million USD)	1 184
Total adspend	(in million EUR)	1 180
TV adspend	(in million DKK)	3 174
TV adspend	(in million USD)	428
TV adspend	(in million EUR)	427
TV adspend	in % of GDP	0.21
TV adspend	per capita (USD)	81

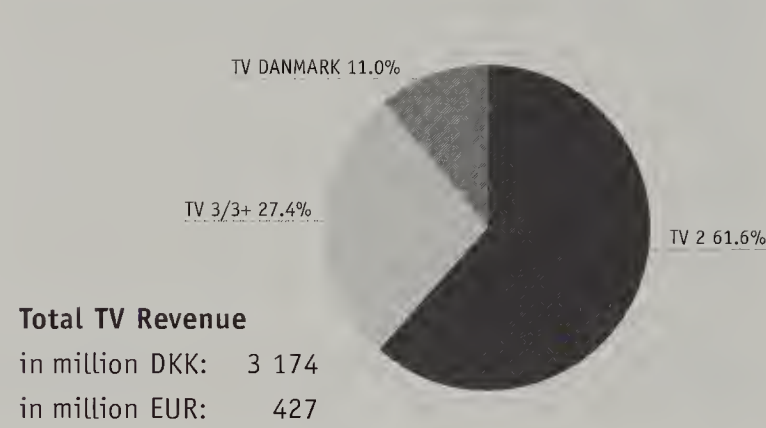
SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



TV ADVERTISING STATISTICS	
Total number of spots broadcast	423 037
Average spot length (in sec.)	25.5
Total number of advertisers	1 349*
Number of TV advertisers	553**
Total number of advertised products	5 646*
Number products advertised on TV	1 436**

Source: “Gallup A/S – a part of Taylor Nelson Sofres Plc, Gallup AD-Facts;
*Big advertisers; **All TV-advertisers/products”

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
FAST MOVING CONSUMER GOODS	881	426	48.4%	13.4%
MUSIC	445	378	84.9%	11.9%
HYGIENE PRODUCTS	411	262	63.7%	8.3%
HARDWARE & APPLIANCES	551	234	42.5%	7.4%
FINANCE	612	213	34.8%	6.7%
TELECOMMUNICATION	667	209	31.3%	6.6%
HIFI, COMPUTERS, TV, ECT.	662	192	29.0%	6.0%
TRANSPORT	778	178	22.9%	5.6%
ENTERTAINMENT	348	137	39.4%	4.3%
CHOCOLATE, CANDY, SNACKS	184	136	73.9%	4.3%
OTHER	3.237	809	25.0%	25.5%
TV Advertisers				
TELE DANMARK	246	127	51.6%	4.0%
PROCTER & GAMBLE	118	104	88.1%	3.3%
CARLSBERG	170	95	55.9%	3.0%
NESTLÉ L'OREAL	124	89	71.8%	2.8%
EMI GROUP	64	62	96.9%	2.0%
UNILEVER	71	59	83.1%	1.9%
SONY	76	57	75.0%	1.8%
THORN	98	55	56.1%	1.7%
MD FOODS	59	55	93.2%	1.7%
MCDONALDS	55	52	94.5%	1.6%
OTHER	7 695	2 419	31.4%	76.2%
Total (in million DKK)	8 776	3 174	36.2%	100.0%
Total (in million EUR)	1 180	427	36.2%	100.0%

Source: Gallup A/S – a part of Tyler Nelson Sofres Plc, Gallup AD-Facts

Finland

In 1999 Channel Four Finland or Nelonen in Finnish, which started programming in summer 1997, and which can be received by some 80% of the population, attained a share of 10% of total viewing time. The channel has been remarkably successful among its target group of urban 25–44 years old.

In spite of stiffening competition, MTV3, Finland’s leading commercial channel, could still claim an audience share of 42% of the total, one of the highest levels in Europe. YLE is Finland’s main public service broadcaster and has two television channels – TV1 and TV2. YLE’s channels saw a total loss of three percentage points. However, the broadcaster still has a remarkably large audience share on its two channels: 23% for TV1 and 20% for TV2, which together brings them to approximately the same amount as MTV3.

Contrary to expectations, the share of TV advertising as a proportion of total media advertising declined by one per cent point to 20 per cent. Thanks to its dominant position, MTV3 could still claim a 83% share of the television advertising market. However, Nelonen’s share of 17% meant an increase of five percentage points within the space of one year. The current trends in development do not seem to favour MTV3. The channel’s turnover showed a slight decrease for a second year in sequence.

No advertising is allowed on the YLE television channels except by special permit. YLE’s revenue comes from TV licence fees and the operating licence fee. Legislation adopted in 1998 renamed the former „public service fee“, paid by commercial TV channels as their contribution to the funding of YLE’s public service programming responsibilities, as the operating licence fee and at the same time made it statutory. (Cable television is exempted, however.) The fee accounted for 14 % of YLE’s turnover in 1999.

The main accent in TV1’s programming is on news, current affairs, information and documentaries. TV2 concentrates on information and documentaries, films, serials and sports. MTV still leans more heavily towards entertainment than YLE, although it has diversified to an increasing extent since the major channel reorganisation in 1993. Since the beginning of regular television broadcasting in Finland up until the early 1990s MTV operated as „a channel inside channels“, leasing its broadcasting time of approximately 20 hours a week from the public service broadcaster YLE on the latter’s two channels. Channel Four is primarily oriented in its programming to fiction and entertainment.

Domestic production accounts for a remarkable large part of the programming of both YLE and MTV. 54% of YLE’s programming was domestic on the company’s two channels; the figure for MTV was 52%. Except its news services, Channel Four purchases all its domestic programmes from independent production companies.

YLE’s and its commercial competitors’ foreign programming differ from each other very clearly. The majority of YLE’s foreign programmes are of European origin, whereas most of MTV’s and Nelonen’s foreign programming comes from the US.

During the 1990’s, the growth in the number of cable television subscribers was relatively slow. At the end of 1999, the number of cable subscribers was 930 000, or 40% of all households. The largest cable server is HTV with nearly 200 000 subscribers in the Helsinki capital area. The company continued to expand its two-way cable network, through which it can provide high-speed Internet access and introduce new pay-TV services.

Satellite reception has increased quite rapidly during the 1990s. In 1999, there were a total of 310 000 households (13%) with access to satellite television. With all statistical overlap eliminated, around 1.2 million households in Finland (51%) had access to cable and/or satellite networks.

Plans are now well under way to set up in Finland three terrestrial digital television multiplexes, with 12 channels in the first stage. Following an experimental phase starting in connection with the Sydney Olympic Games, the definitive launch of the new digital offerings for the general public has now been scheduled for late summer 2001. In 1999, the government decided on the licences for digital television operations. The licences were granted for ten years, starting from 1 September 2000.

YLE, MTV3 and Channel Four will take firm strongholds in the new digital environment. Among the new contenders will be Canal+ Finland (pay-TV; mainly movies and quality entertainment) and a channel focusing on home, health and leisure (partly pay-TV; by a coalition of several middle-sized domestic media houses).

It is the government’s objective that the analogue network could be waived by the end of 2006 as the present analogue licences expire. The licence holders must ensure that 70% of Finns will be covered by digital networks by the end of 2001. By the end of 2006 the operations must be national.

Finland

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General Data

COUNTRY	
Land area (km ²)	338 145
Total population	5 171 000
Number of households*	2 236 000
Average household size*	2.3
In % of households equipped	
Phone	98.6
Mobile telephone subscribers	71.7
PC's	43.6
Internet access	25.9
Internet users	41.8 ¹

ECONOMICS	
GDP in million FIM (at current prices)	717 761
GDP per capita in FIM (at current prices)	138 805
Inflation rate in 1999 (in %)	1.2
Value of FIM in Euro (EUR)	1 EUR = 5.95 FIM
Value of FIM in US-Dollar (USD)	1 USD = 5.91 FIM

Source: Statistics Finland

*1998, ¹ Population 15–74 (Taloustukimus Oy)

TV OVERVIEW	
Total number of TV households (TVHH)	2 124 000
In % of all households	95.0
Numbers of channels received by 70% of the population	4
TV License-Fee cost per year	FIM 882.–/EUR 148.3

TV EQUIPMENT	
	in % of TVHH
Colour TV	94.7
Multiset (homes with more than 1 TV set)	43.5
VCR	75.7
Teletext	66.7
Remote control	82.3

Sources: Finnpanel Oy, Ministry of Traffic and Communications; Satellite and Antenna Association SANT; Statistics Finland, *Statistical Yearbook 2000 of European Audiovisual Observatory; **1998

TV DISTRIBUTION		
		in % of TVHH
Cable*	passed	56.3
	connected	39.2
Satellite	private dish/DTH	3.8**
	collective dish/SMATV	9.6**
Terrestrial	analog	100.0
	digital	none
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
YLE-1	1958	T, C	100%	Finn./Swed.	109	Generalist	L–F	none
YLE-2	1956/65	T, C	100%	Finn./Swed.	78	Generalist	L–F	none

Source: YLE

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
MTV 3	1957	T, C	100%	Finnish	108	Generalist	Adv.	In-house
NELONEN	1997	T, C, S	79%	Finnish	n.a.	Generalist	Adv.	In-house

Source: MTV 3; Nelonen

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
MOON TV	1997	C	17%	Finnish	168	Games	Adv. + other	n.a.

Source: MoonTV

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
TV 5 EUROPE	Public	C, S	41%	French	Generalist	L–F, Spon.
MTV EUROPE	Private	C, S	41%	English	Music	Adv.
EUROSPORT	Private	C, S	40%	English	Sport	Adv.
SVT EUROPA	Public	T, C, S	32%	Swedish	Generalist	L–F
DEUTSCHE WELLE TV	Public	C, S	30%	German/Multilingual	Generalist	L–F
BBC WORLD	Private	C, S	18%	English	News	Adv.
EURONEWS	Private	C, S	15%	English /Finnish	News	Adv.
CNBC	Private	C, S	6%	English	Finance	Adv.
CNN INT.	Private	C, S	< 5%	English	News	Adv.
BBC PRIME	Public	C, S	< 5%	English	Entertainment	Adv.
Sky Entertainment	Private	C, S	< 5%	English	Entertainment	Adv.
TNT /CARTOON	Private	C, S	< 5%	English	Old Movies/Cartoons	Adv.
Sky News	Private	C, S	< 5%	English	News	Adv.
National Geographic	Private	C, S	< 5%	English	Nature	Adv.
TVE INT.	Private	C, S	< 5%	Spanish	Generalist	L–F, Adv.
3 SAT	Public	C, S	< 5%	German	Generalist	L–F
TRAVEL	Private	C, S	< 5%	English	Travel	Adv.
SCI-FI	Private	C, S	< 5%	English	Sci-fi	Adv., Sub.
CMT	Private	C, S	< 5%	English	Music	Adv.
VH-1	Private	C, S	< 5%	English	Music	Adv.

Sources: Ministry of Traffic and Communications; Statistics Finland

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
SVT 1	Public	T, C, S	10%	Swedish	Generalist	L–F, Spon.
SVT 2	Public	T, C, S	9%	Swedish	Generalist	L–F, Spon.
TV 4	Private	C, S	4%	Swedish	Generalist	Adv.
TV 3	Private	C, S	2%	Swedish	Generalist	Adv.
FEMMAN /KANAL 5	Private	C, S	< 2%	Swedish	Generalist	Adv.
ETV	Public	T, C, S	< 2%	Estonian	Generalist	Gvt, Spon.
ORT	Public	T, C, S	< 2%	Russian	Generalist	Adv.
RTR	Public	T, C, S	< 2%	Russian	Generalist	L–F, Adv.
RTL	Private	C, S	< 5%	German	Generalist	Adv.
VIVA	Private	C, S	< 5%	German	Music	Adv.
Viva 2	Private	C, S	< 5%	German	Music	Adv.
RAI UNO	Public	C, S	< 5%	Italian	Generalist	L–F, Adv.

Sources: Ministry of Traffic and Communications; Statistics Finland

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
TV 1000	1996	C, S	3 000*	Engl./sub. Finn.	168	Movies, Sport	**	Sub.	No Sales
TV 1000 CINEMA	1996	C, S	18 000*	Engl./sub. Finn.	168	Movies, Sport	**	Sub.	No Sales
CANAL+	1997	C, S	n.a.	Engl./sub. Finn.	168	Movies, Sport	***	Sub.	No Sales
CANAL+ GOLD	1999	C, S	n.a.	Engl./sub. Finn.	168	Movies, Sport	***	Sub.	No Sales
CANAL+ BLUE	1999	C, S	n.a.	Engl./sub. Finn.	94	Movies, Sport	***	Sub.	No Sales

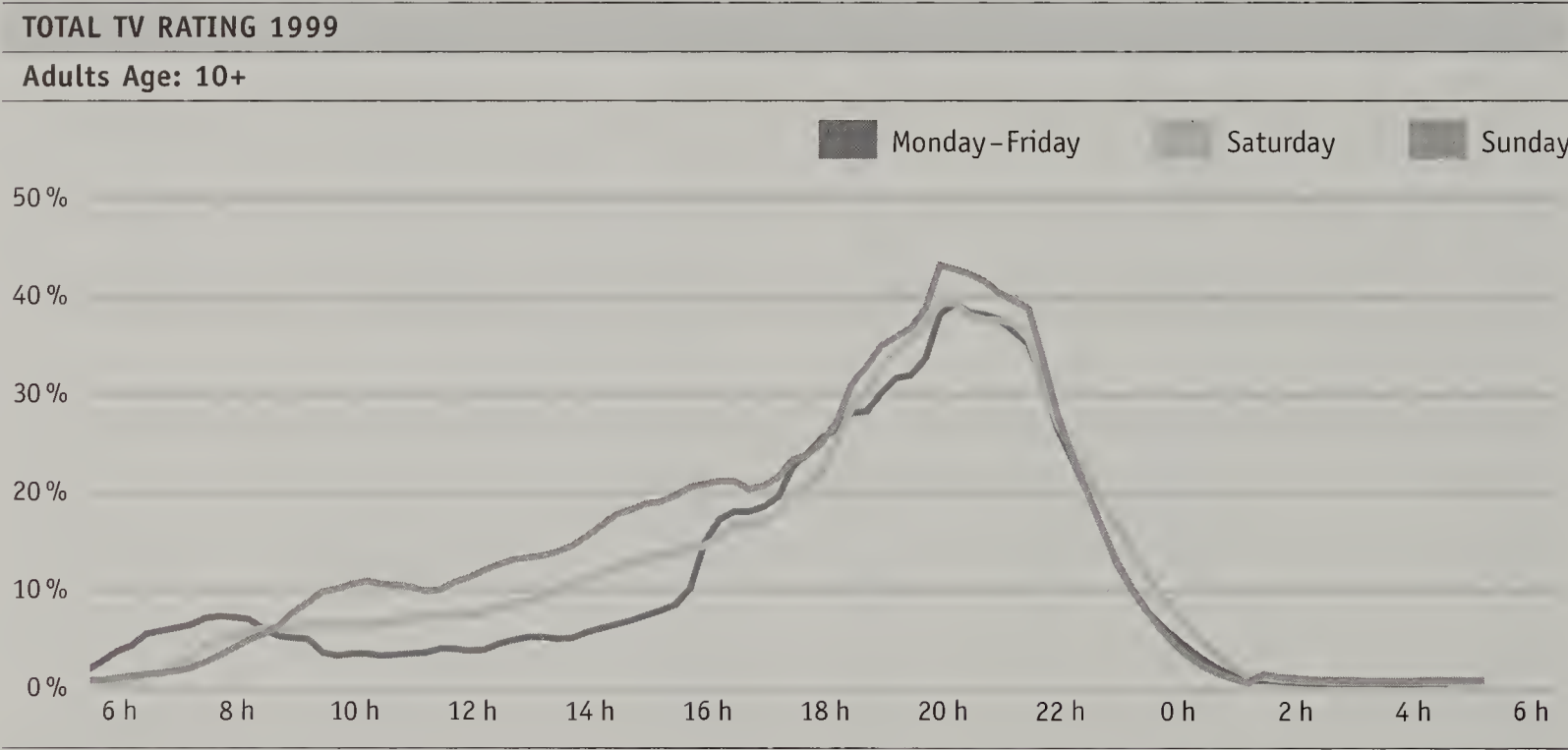
Sources: Canal+ Finland; TV 1000 Finland *1998 (Statistical Yearbook 2000 of European Audiovisual Observatory), ** Total Cost for both TV 1000 and TV 1000 Cinema is FIM 119
***Total Cost for Canal+, Canal+ Gold and Canal+ Blue is FIM 149

DIGITAL PACKAGES								
Channels	Launch	Diff.	Decoder	Subscr.	Language	No.of ch.	Revenue	Cost/month
CANAL DIGITAL	1997	S	Philips	n.a.	Fin./Swed./Engl. etc.	33	Sub.	FIM 99.–

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	FINNPANEL OY
Panel/Sampling Size	730 households
Instrument used (people-meter, telefon, face-to-face)	People-meter
Population size in 000	
Individuals 3+	4 958
Adults 10+	4 504
Main Purchase Responsibles	2 195
Young Adults 15–34	1 325
Children 3–9	454

Source: EURODATA TV/Finnpanel Oy

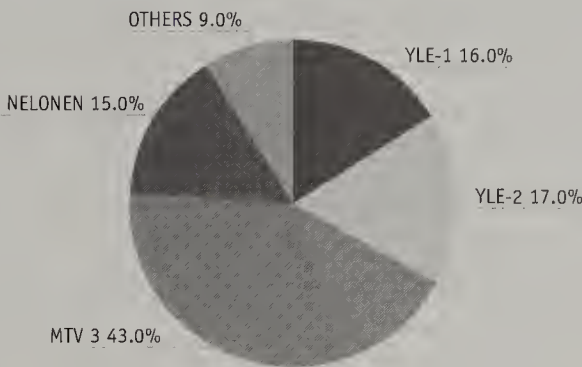
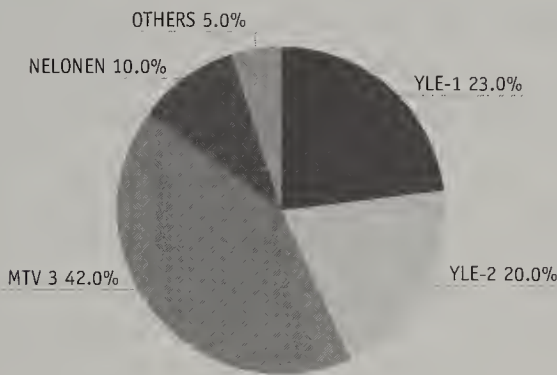


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 10+			Young Adults 15–34			Main Purchase Responsibles			Children 3–9		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	71.0	71.0	75.0	n.a.	n.a.	80.0	n.a.	n.a.	68.0	n.a.	n.a.	61.0
Viewing time per Viewer	211	211	215	n.a.	n.a.	183	n.a.	n.a.	235	n.a.	n.a.	118
Viewing time per Individual	150	150	161	n.a.	n.a.	124	n.a.	n.a.	188	n.a.	n.a.	73

Sources: EURODATA TV/FINNPANEL OY

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS	
Adults 10+, all day (02:00–02:00)	Young Adults 15–34, all day (02:00–02:00)



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00								
	Adults 10+		Young Adults 15–34		Main Purchase Responsibles		Children 3–9	
	1998	1999	1998	1999	1998	1999	1998	1999
YLE-1	25.0%	23.0%	19.0%	16.0%	19.0%	23.0%	n.a.	23.0%
YLE-2	21.0%	20.0%	18.0%	17.0%	18.0%	20.0%	n.a.	24.0%
MTV 3	42.0%	42.0%	46.0%	43.0%	46.0%	44.0%	n.a.	36.0%
NELONEN	7.0%	10.0%	11.0%	15.0%	11.0%	10.0%	n.a.	11.0%
OTHERS	5.0%	5.0%	6.0%	9.0%	6.0%	3.0%	n.a.	6.0%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 10+		Young Adults 15–34		Main Purchase Responsibles		Children 3–9	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	13– 18 h	18– 22.30 h	13– 18 h	18– 22.30 h	13– 18 h	18– 22.30 h	13– 18 h	18– 22.30 h
YLE-1	20.0%	23.0%	14.0%	17.0%	20.0%	23.0%	14.0%	17.0%
YLE-2	22.0%	22.0%	17.0%	18.0%	22.0%	21.0%	47.0%	23.0%
MTV 3	42.0%	41.0%	45.0%	42.0%	44.0%	43.0%	28.0%	43.0%
NELONEN	9.0%	10.0%	13.0%	18.0%	9.0%	10.0%	6.0%	12.0%
OTHER	7.0%	4.0%	11.0%	5.0%	5.0%	3.0%	6.0%	6.0%

Sources: EURODATA TV/FINNPANEL OY

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
TV-UUTISET JA SÄÄ	Finland	YLE-1	News	20:30	06/12	48.2%	81.1%
ITSENÄISYYSPÄIVÄN JUHLA	Finland	YLE-1	Documentary	20:45	06/12	44.9%	77.1%
ICE HOCKEY W. CHMP	Finland	YLE-2	Sport	16:46	16/05	39.2%	79.1%
BUMTSIBUM!		MTV 3	Entertainment	20:00	23/01	38.5%	74.1%
TV-UUTISET (ERÄTAUKO)		YLE-2	News	17:43	16/05	37.3%	86.3%
ICE HOCKEY W. CHMP	Finland	YLE-1	Sport	20:48	13/05	36.5%	73.0%
MISS FINLAND		MTV 3	Variety Show	19:59	14/02	36.0%	70.9%
FORMULA 1–BRAZIL		MTV 3	Sport	19:32	11/04	34.3%	71.1%
ATHLETICS W. CHMP	Finland	YLE-2	Sport	19:33	29/08	33.4%	67.0%
ICE HOCKEY W. CHMP		YLE-2	Sport	19:47	15/05	32.7%	69.0%
KYMMENEN UUTISET		MTV 3	News	21:58	14/02	32.3%	74.1%
FORMULA 1–EUROPE	Finland	MTV 3	Sport	14:33	26/09	31.7%	87.9%
SKI W. CUP		YLE-2	Sport	11:17	28/02	31.2%	87.3%
FORMULA 1–JAPAN		MTV 3	Sport	06:29	31/01	30.7%	97.0%
NAPAKYMPPI	Finland	MTV 3	Entertainment	19:31	06/02	30.0%	68.2%
KARPOLLA ON ASIAA	Finland	MTV 3	Documentary	19:20	31/10	29.3%	67.4%
SYKSYN SÄVEL 1999	Finland	MTV 3	Entertainment	19:30	09/10	29.3%	66.2%
SPORT SQUARE	Finland	YLE-1	Sport-News	20:55	28/12	29.2%	65.5%
SYDÄN TOIVOA TÄYNNÄ	Finland	MTV 3	Current affairs	20:01	05/04	28.4%	63.4%
YHDEKSÄN UUTISET	Finland	MTV 3	News	20:57	04/01	28.1%	62.9%

Sources: EURODATA TV/FINNPANEL OY–BASIS 10+

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
HOME ALONE 2	USA	MTV 3	19:49	26/12	20.6%	41.8%
MRS. DOUBTFIRE	USA	MTV 3	21:23	05/04	18.8%	64.2%
INDEPENDENCE DAY	USA	MTV 3	21:21	11/10	18.7%	60.1%
BABY’S DAY OUT	USA	MTV 3	20:03	17/01	18.3%	41.0%
SEA OF LOVE	USA	MTV 3	21:23	17/05	18.1%	60.2%
SPEED	USA	MTV 3	21:20	25/01	17.6%	56.5%
MAA ON SYNTINEN LAULU	Finland	YLE-2	22:00	01/04	17.3%	57.8%
LONG KISS GOODNIGHT	USA	YLE-2	22:00	25/12	17.1%	52.6%
RAINMAN	USA	MTV 3	21:21	28/06	16.9%	62.3%
FATHER OF THE BRIDE II	USA	MTV 3	21:22	08/11	16.8%	47.6%

Sources: EURODATA TV/FINNPANEL OY–BASE 10+

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
ICE HOCKEY W. CHMP		YLE-2	16:46	16/05	39.2%	79.1%
ICE HOCKEY W. CHMP		YLE-1	20:48	13/05	36.5%	73.0%
FORMULA 1–BRAZIL		MTV 3	19:32	11/04	34.3%	71.1%
ATHLETICS W. CUP		YLE-2	19:33	29/08	33.4%	67.0%
ICE HOCKEY W. CHMP		YLE-2	19:47	15/05	32.7%	69.0%
FORMULA 1–EUROPE		MTV 3	14:33	26/09	31.7%	87.9%
SKI W. CUP		YLE-2	11:17	28/02	31.2%	87.3%
FORMULA 1–JAPAN		MTV 3	06:29	31/10	30.7%	97.0%
FORMULA 1–BELGIUM		MTV 3	14:29	29/08	28.0%	85.7%
FORMULA 1–HUNGARY		MTV 3	14:31	15/08	27.5%	88.7%

Source: EURODATA TV/FINNPANEL OY–Base 10+

Top Programmes Channel by Channel

YLE-1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TV-UUTISET JA SÄÄ	Finland	News	365	20:30	20	48.2%	81.1%
SPORT SQUARE	Finland	Sport-News	358	20:55	10	29.2%	65.5%
ITALYPSY	Finland	Entertainment	63	21:15	15	23.2%	52.0%
UUTISVUOTO	Finland	Entertainment	35	21:30	30	23.1%	54.6%
KOTIKATU	Finland	Series	27	19:45	40	22.7%	50.6%
A-STUDIO	Finland	Magazine	101	21:00	20	19.4%	44.0%
KOTIKATSOMO: ANGELA	Finland	Series	6	21:20	50	19.0%	51.9%
A-BROS	Finland	Magazine	32	21:00	25	17.6%	39.8%
YKKÖSDOKUMENTTI	Finland	Documentary	36	21:15	50	17.5%	42.7%
A-STUDIO: A-TALK	Finland	Magazine	21	21:06	40	17.0%	42.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ITSENÄISYYSPÄIVÄN JUHLA	Finland	Entertainment	06/12	20:45	90	44.9%	77.1%
ICE HOCKEY W. CHMP		Sport	13/05	20:48	170	36.5%	73.0%
VAALIT 99		News	21/03	20:46	75	28.1%	54.4%
ATHLETICS W. CHMP		Sport	29/08	21:31	90	27.1%	60.6%
SKIING		Sport	06/01	14:20	160	25.8%	78.4%
SKIING W. CHMP	Finland	Sport	25/02	15:01	90	24.8%	91.2%
KOTIKATSOMO: MENNYT HEINÄKUU		TV-Fiction	20/12	21:22	72	21.9%	55.5%
PRESIDENTTI 2000		News	08/12	21:05	72	20.0%	45.0%
KOTIKATSOMO: KIVINEN LINTU		TV-Fiction	13/12	21:20	70	19.8%	45.8%
KOTIK.: KAIKKI KUNNOLLISET VAIMOT		TV-Fiction	13/09	21:21	40	16.7%	43.2%

Sources: EURODATA TV/FINNPANEL OY Base: 10+

YLE-2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TV-UUTISET (ERÄTAUKO)	Finland	News	47	17:40	10	37.3%	86.3%
TUTTU JUTTU SHOW	Finland	Entertainment	38	21:00	50	27.3%	56.8%
HOVIMÄKI	Finland	Series	11	21:00	55	23.8%	54.7%
METSOLAT	Finland	Series	17	21:15	50	23.0%	49.7%
POLIISI-TV	Finland	Documentary	48	22:00	30	22.0%	52.3%
AJANKOHTAINEN KAKKONEN	Finland	Magazine	45	21:00	40	20.7%	48.7%
TALVISOTA	Finland	Series	5	21:40	55	20.5%	54.0%
SILMINNÄKIJÄ	Finland	Documentary	50	22:30	30	18.6%	61.7%
MAALAIKOMEDIA: VAIN*	Finland	Series	6	21:00	50	18.5%	41.2%
YMPÄRISTÖUUTISET	Finland	News	52	18:10	20	17.6%	52.7%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
ICE HOCKEY W. CHMP	Sport	16/05	16:46	229	39.2%	79.1%
ATHLETICS W. CHMP	Sport	29/08	19:33	119	33.4%	67.0%
ICE HOCKEY W. CHMP	Sport	15/05	19:47	176	32.7%	69.0%
SKI W. CHMP	Sport	28/02	11:17	219	31.2%	87.3%
SKI W. CHMP	Sport	21/02	12:52	128	26.1%	80.7%
SKI W. CHMP	Sport	26/02	21:03	157	25.9%	66.4%
ICE HOCKEY W. CHMP	Sport	12/05	16:47	168	23.1%	64.1%
ICE HOCKEY W. CHMP	Sport	10/05	16:45	172	23.0%	61.6%
ATHLETICS W. CHMP	Sport	22/08	19:44	107	22.8%	53.8%
ATHLETICS W. CHMP	Sport	27/08	19:32	118	22.6%	60.0%

Sources: EURODATA TV/FINNPANEL OY Base: 10+

*MUUTAMAN HUIJARIN TÄHDEN

MTV 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
BUMTSIBUM!	Finland	Entertainment	29	20:00	60	38.5%	74.1%
KYMMENEN UUTISET	Finland	News	309	22:00	20	32.3%	74.1%
NAPAKYMPPI	Finland	Entertainment	34	19:30	30	30.0%	68.2%
KARPOLLA ON ASIAA	Finland	Magazine	37	19:20	15	29.3%	67.4%
SYDÄN TOIVOA TÄYNNÄ	Finland	Series	12	20:00	50	28.4%	63.4%
YHDEKSÄN UUTISET	Finland	News	52	20:55	15	28.1%	62.9%
TULOSRUUTU	Finland	Sport-News	138	19:05	10	28.0%	66.2%
PUHTAAT VALKEAT LAKANAT	Finland	Series	44	20:00	60	27.1%	58.3%
SALATUT ELÄMÄT	Finland	Series	179	19:30	30	26.6%	64.4%
SUNNUNTAIRAPORTTI	Finland	Documentary	24	19:40	20	26.2%	60.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MISS FINLAND	Finland	Entertainment	14/02	19:59	116	36.0%	70.9%
FORMULA 1–BRAZIL		Sport	11/04	19:32	144	34.3%	71.1%
FORMULA 1–EUROPE		Sport	26/09	14:33	143	31.7%	87.9%
FORMULA 1–JAPAN		Sport	31/10	06:29	148	30.7%	97.0%
SYKSYN SÄVEL 1999	Finland	Entertainment	09/10	19:30	88	29.3%	66.2%
LENTSU	Finland	TV Fiction	25/10	20:00	55	28.1%	60.4%
FORMULA 1–BELGIUM	Finland	Sport	29/08	14:29	132	28.0%	85.7%
FORMULA 1–HUNGARY		Sport	15/08	14:31	158	27.5%	88.7%
LINNAN JUHLAT 1999		Entertainment	07/12	19:59	58	26.0%	56.7%
BUMTSIBUM! /VAALIAREENA	Finland	Entertainment	06/03	20:01	59	25.8%	56.0%

Sources: EURODATA TV/FINNPANEL OY Base: 10+

NELONEN							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
KAVERILLE EI JÄTETÄ	Finland	Series	7	20:10	45	13.9%	28.4%
HALUATKO MILJONÄÄRIKSI?	Finland	Entertainment	21	19:00	30	13.0%	32.9%
TEAM AHMA	Finland	Series	11	20:10	30	10.5%	25.4%
4D	Finland	Documentary	49	20:55	58	10.4%	25.8%
GUINNESS WORLD RECORDS	Finland	Entertainment	7	19:25	30	9.5%	22.1%
RIKOSRAPORTTI	Finland	Documentary	14	21:00	30	9.0%	23.3%
HUULIVEIKOT	Finland	Entertainment	5	20:40	14	8.8%	19.7%
NELOSEN UUTISET JA SÄÄ	Finland	News	351	19:55	10	8.5%	22.9%
WOMEN BEHAVING BADLY	UK	Series	15	21:30	30	8.0%	20.9%
ISÄNMAAN TOIVOT	Finland	Series	15	20:55	35	7.6%	17.3%

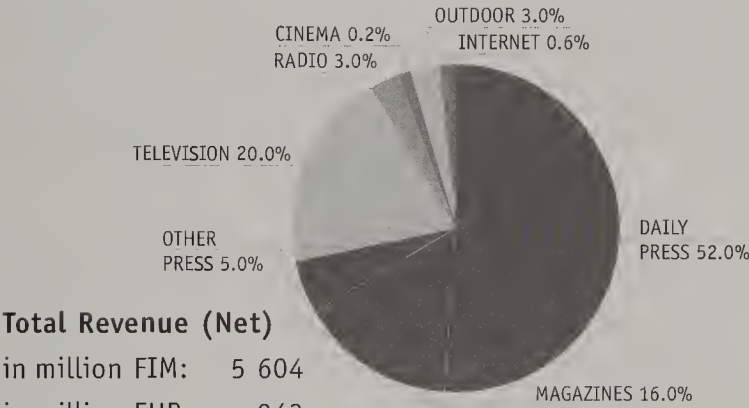
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MISSION IMPOSSIBLE	USA	Movie	03/10	21:07	128	15.5%	37.9%
MR. BEAN	USA	Movie	05/12	21:08	104	14.6%	30.4%
THE FIRST WIVES CLUB	USA	Movie	07/11	21:06	116	11.8%	29.3%
FRENCH KISS	USA	Movie	31/01	20:56	121	11.0%	29.3%
ROBINSON CRUSOE	USA	Movie	15/08	20:56	98	10.9%	29.1%
THE DISTINGUISHED GENTLEMAN	USA	Movie	24/01	20:58	123	10.7%	27.4%
BEVERLY HILLS COP III	USA	Movie	04/04	20:57	121	10.6%	29.8%
BEVERLY HILLS COP	USA	Movie	02/04	20:59	117	10.2%	30.2%
JUMANJI	USA	Movie	24/10	21:06	117	10.2%	23.4%
THE LAST BOY SCOUT	USA	Movie	28/02	20:59	118	9.7%	28.0%

Sources: EURODATA TV/FINNPANEL OY Base: 10+

Advertising Expenditure

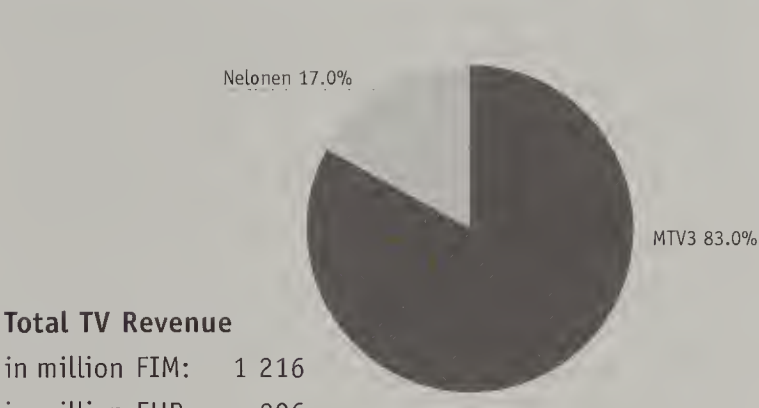
ADVERTISING FIGURES	NET
Total adspend (in million FIM)	5 604
Total adspend (in million USD)	948
Total adspend (in million EUR)	943
TV adspend (in million FIM)	1 216
TV adspend (in million USD)	206
TV adspend (in million EUR)	205
TV adspend in% of GDP	0.17
TV adspend per capita (USD)	40

SHARE OF MEDIA EXPENDITURE	NET
Category: Market Share in%	



Total Revenue (Net)
in million FIM: 5 604
in million EUR: 943

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in%



Total TV Revenue
in million FIM: 1 216
in million EUR: 206

Source: Gallup Mainostieto

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	6 Media*	Television	Spent in TV	Share of TV Expenditure
FOOD	461	268	58.1%	22.0%
COSMETICS	129	75	58.4%	6.2%
CARS	462	68	14.6%	5.6%
MOBILE PHONES & SERVICES	188	48	25.5%	3.9%
HOME ELECTRONICS	87	46	52.8%	3.8%
DRUGS/PHARMACEUTICALS	134	39	29.0%	3.2%
DETERGENTS	42	39	93.6%	3.2%
TRAVEL	244	39	15.9%	3.2%
PRESS/PUBLISHERS	123	37	30.2%	3.0%
SERVICE AGENCIES	191	35	18.3%	2.9%
OTHERS	3 543	522	14.7%	42.9%
TV Advertisers				
PROCTER & GAMBLE	35	31	88.8%	2.5%
LEVER	34	30	89.1%	2.5%
L'OREAL FINLAND	43	27	62.3%	2.2%
SONERA	92	24	25.9%	2.0%
COCA-COLA	24	23	97.8%	1.9%
VALIO	47	23	48.5%	1.9%
HARTWALL	38	18	47.3%	1.5%
KELLOGGS	15	15	99.4%	1.2%
RADIOLINJA	53	15	28.6%	1.2%
SCA HYGIENE PRODUCTS	17	14	83.6%	1.2%
OTHERS	5 206	996	19.1%	81.9%
Total (in million FIM)	5 604	1 216	21.7%	100.0%
Total (in million EUR)	943	205	21.7%	100.0%

Source: Gallup Mainostieto

*Press, TV, Radio, Cinema, Internet, Outdoor

France

In 1999, France set the stage for economic, political, and technological events that have foreshadowed important developments in broadcasting.

The first change was the return of growth, linked to dynamic players in the new economy. Boosted by record viewing figures in 1999 (with average viewing time up by 2 minutes a day), investment in the “TMT” sectors-technology media and telecommunications – more than doubled over the year, taking gross advertising revenue for broadcasting as a whole to over 28 billion francs at the end of the year, and growth of 12.5% in the first quarter of the year 2000.

Although the internet was perceived at the beginning of the year as a potential competitor for TV, this new medium has proved to be a catalyst in generating advertising revenue for French networks. There was not one day in 1999 that you could not see a web-related ad of some kind on the TV screen, from a telecom start-up to an ISP provider. Between June 1999 and May 2000, more than 65 sites were counted on the TV medium.

This massive influx of Internet brands triggered numerous arguments about web sites’ access to advertising in areas that were off-limits to television broadcasters in France (distribution, press, cinema, publishing). The issue is still not decided. After deciding to lift the ban as of September 1st, 2000, the CSA (the French broadcasting authority) was forced to review its stance in response to government pressure and industry pressure from cinema, radio and press.

The second political event was the proposed, then adopted, new broadcasting law in France. Presented at the end of 1998 by the minister for culture and communication, Mme Catherine Trautmann, and voted into law by the French parliament at the end of the first half of 2000, this new law strengthens the public sector’s influence in broadcasting by introducing three measures:

- The creation of Holding France Television, combining France 2, France 3 and La 5e.
- The reduction of allowable advertising time on public networks in order to once and for all end the long streams of ads on these channels (on a sliding scale from 10 minutes per hour to 8, in place of the previous 12).
- The start of development in terrestrial digital TV, with a priority to public networks.

This new law has a number of consequences. The balance of power between the public and private networks has been considerably altered and the balance of financial stakes has been fundamentally re-aligned. In fact, the slide in profits resulting from decreased advertising on public networks should be offset by new revenues. These will come from the State in the form of licence fees, but also from other types of advertising space marketing such as the public networks’attempts to sell advertising space by auction at the beginning of 2000.

Finally, reduced advertising on public channels will accelerate ad-saturation in the rest of TV broadcasting, increasing the need for audience or GRP of most broadcasters.

The main remedy to this shrinkage in potential advertising lies in the thematic channels available on cable and satellite. According to the latest Audicabsat report by Mediametrie in November-December 1999, almost 11 million French viewers already subscribed to cable or satellite theme channels – that is 21% of total TV viewers against 18% a year earlier.

The second remedy is terrestrial digital TV. By the end of 2001, the CSA should license 6 multiplex bands of 4–6 digital transmissions, making a total of 24 to 36 new frequencies available to the nation. These will be operated by the major existing players (France Television, TF 1, M6 and Canal+), but also by new audiovisual groups such as AB, Pathe, and Lagardere which has just linked up with Canal+ by taking a 34% stake in its subsidiary Canalsatellite. Other operators are also involved, such as local TV channels and regional press dailies.

Clearly, this process will accelerate people’s access to a larger range of channels, and increase their takeup of new equipment. New digital teleivison sets are poised to provide true viewer interactivity and convergence. The major manufacturers are already talking about upgrading 27 million TV sets to digital!

Since February 28th, 2000, a new generation of people-meters has allowed digital audience figures to be reported in a way not previously possible. Developed by Mediametrie, this advance has placed a bomb on the TV landscape. For the first time ever, it has revealed new hierarchies of audience.

Although the audience shares for traditional channels seem to have been relatively stable in 1999, they have been pushed aside by the strong rise in thematic channels following the inauguration of the new system. Audience shares for the 15+ age group rose from 4.7% in February this year to 7.5% in March, a month later. Among younger viewers, such as the 4–10 target group, results are even more remarkable, with the rise from 6.8% to 14.6%!

France

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COUNTRY	
Land area (km ²)	551 602
Total population	60 186 184
Number of households	24 180 000
Average household size	2.5
In % of households equipped	
Phone	98.0
Mobile telephone subscribers*	33.2
PC's*	22.2
Internet access**	5.9
Internet users**	12.0

Source: INSEE *Médiamétrie 24 000 Sept–Dec 99; **base: population aged 18+

ECONOMICS	
GDP in billion FRF (at current prices)	8 565
GDP per capita in FRF (at current prices)	145 542
Inflation rate in 1999 (in %)	1.4
Value of FRF in Euro (EUR) ¹	1 EUR = 6.56 FRF
Value of FRF in US-Dollar (USD) ¹	1 USD = 6.53 FRF

Source: INSEE ¹December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	22 580 000
In % of all households	93.4
Numbers of channels received by 70% of the population	7
TV License-Fee cost per year	FF 744.-/EUR 113.4

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.2
Multiset (homes with more than 1 TV set)	40.2
VCR	78.3
Teletext	n.a.
Remote control	95.9

Source: Mediametrie 75000 Sept.-Dec.99

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	32.0*
	connected**	9.0
Satellite	Private dish/DTH***	12.3
	Collective dish/SMATV	n.a.
Terrestrial	analog	93.4
	digital	0
	MMDS	n.a.

*Statistical Yearbook 2000; European Audiovisual Observatory

**percentage of individuals 4+ subscribing to cable

***percentage of individuals 4+ suscribing to a satellite bouquet

TV SUBSCRIPTION			
Analog pay TV subscribers*	9.0%	Digital TV subscribers	12.3%

Source: Médiamétrie Audicabsat N-D 99

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.*	Language	h/week	Programming	Revenue	Sales House
FRANCE 2	1975	T, C, S	100%	French	168	Generalist	L-F, Adv.	F.T.P.**
FRANCE 3	1983	T, C, S	100%	French	140	Generalist	L-F, Adv.	F.T.P.**
LA 5E/ARTE	1994	T, C, S	91%	French	90	Educ./Discov.	L-F, Adv.	IP France
FESTIVAL	1996	C, S	6%	French	98	Fiction	Sub., Adv.	F.T.P.**
HISTOIRE	1997	C, S	5%	French	84	Docum.	Sub., Adv.	F.T.P.**
MEZZO	1996	C, S	5%	French	77	Music	Sub., Adv.	F.T.P.**
REGIONS	1998	C, S	5%	French	140	Regions	Sub., Adv.	F.T.P.**
RFO SAT	1982	S	13%	French	168	Overseas prog.	Sub., Adv.	Them. régie

Sources: Mediamétrie 75000 and Audicabsat Nov-Dec 99

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TF 1	1975	T, C, S	100%	French	168	Generalist	Adv.	TF 1 Publicité
M6	1987	T, C, S	93%	French	168	Generalist	Adv.	M6 Publicité
CANAL+	1984	T, C, S**	80%	French	168	Generalist	Adv., Sub.	Canal+
RTL 9	1955	T, C, S	15%	French	112	Movies/Series	Adv., Sub.	Eur. Régies
TMC	1954	T, C, S	13%	French	106	Generalist	Adv., Sub.	Them. Regie
13E RUE	1997	C, S	8%	French	140	Movies/Series	Adv., Sub.	Them. Regie
AB MOTEURS	1996	C, S	8%	French	126	Cars, bikes	Adv., Sub.	Eur. Régies
AFB INFOS	2000	C, S	6%	French	168	Interact. News	Adv., Sub.	IP France
CINEINFO FR.	2000	C, S	9%	French	168	Movies promot.	Adv., Sub.	IP France
MOTORS TV	2000	C, S	8%	French	126	Cars, bikes	Adv., Sub.	IP France
MTV FRANCE	n.a.	C, S	17%	Engl./French	168	Music	Adv., Sub.	IP France
AB 1	1995	C, S	11%	French	140	Series	Adv., Sub.	Eur. Régie
BANDIAGARA*	1997	S	4%	French	168	Children-Games	Adv., Sub.	Them. Regie
CANAL J	1985	C, S	15%	French	93	Children	Adv., Sub.	Them. Regie
CANAL JIMMY	1991	C, S	14%	French	77	Series	Adv., Sub.	Them. Regie
CANALSAT JEUX*	1997	S	8%	French	168	Children-Games	Adv., Sub.	In-house
CARTOON NETWORK	1993	C, S	8%	French	168	Children	Adv., Sub.	TF 1 Publicité
CLUB TV ACHAT*	1998	S	7%	French	168	Homeshopping	Adv., Sub.	M6 Publicité
COMEDIE !	1997	C, S	10%	French	85	Entertainment	Adv., Sub.	Them. Regie
DEMAIN	1997	C, S	9%	French	168	Employment	Adv., Sub.	Them. Regie
EQUIDIA	1996	C, S	13%	French	119	Horse race	Adv., Sub.	In-house
FASHION TV	1997	C, S	12%	French	168	Fashion	Adv., Sub.	Them. Regie
FI	1998	S	5%	French	168	Financial	Adv., Sub.	TF 1 Publicité
FOX KIDS	1997	C, S	9%	French	105	Children	Adv., Sub.	IP France
FUN TV	1997	S	5%	French	168	Music	Adv., Sub.	M6 Publicité
GAME ONE*	1998	S	8%	French	168	Videogames	Adv., Sub.	Them. Regie
INFOSPORT	1998	C, S	5%	French	126	Sportnews	Adv., Sub.	In-house
L'EQUIPE TV	1998	C, S	10%	French	168	Sport	Adv., Sub.	In-house
LA CHAÎNE MÉTÉO	1995	C, S	13%	French	168	Weather	Adv., Sub.	Them. Regie
LCI	1994	C, S	18%	French	133	News	Adv., Sub.	TF 1 Publicité
M6 MUSIC	1997	C, S	6%	French	168	Music	Adv., Sub.	M6 Publicité
MCM	1989	C, S	15%	French	168	Music	Adv., Sub.	Them. Regie
MCM AFRICA	1996	S	8%	French	168	Music	Spon., Sub.	Them. Regie
MÉTÉO EXPRESS*	1997	S	5%	French	168	Weather	Adv., Sub.	In-house
ODYSSÉE	1997	C, S	7%	French	98	Documentaries	Adv., Sub.	TF 1 Publicité
PARIS PREMIÈRE	1986	C, S	15%	French	168	Generalist	Adv., Sub.	M6 Publicité
PATHÉ SPORT	1996	S	8%	French	126	Sport	Adv., Sub.	IP France
PLANÈTE	1988	C, S	15%	French	126	Documentaries	Adv., Sub.	Them. Regie
RFM TV	n.a.	C, S	8%	French	168	Music	Adv., Sub.	Eur. Régie
SÉRIE CLUB	1993	C, S	10%	French	126	Series	Adv., Sub.	M6 Publicité
SHOPPING AVENUE	1998	S	5%	French	168	Homeshopping	Adv., Sub.	TF 1 Publicité
TELETOON	1997	C, S	7%	French	98	Children	Adv., Sub.	TF 1 Publicité
TÉVA	1996	C, S	7%	French	133	Women	Adv., Sub.	M6 Publicité
VOYAGE	1996	C, S	11%	French	114	Discovery	Adv., Sub.	Them. Regie

Sources: Mediamétrie 75000 and Audicabsat Nov-Dec 99 (techn. penetration in % of TV population 4 +)

*interactive programming, **technical penetration on clear programmes

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech.Pen.*	Language	Programming	Revenue
BBC PRIME/BBC WORLD	Private	C, S	15%	English	Entertainment/News	Adv.
BLOOMBERG	Private	C, S	13%	English	News	Adv.
CNN	Private	C, S	14%	English	News	Adv.
EURONEWS	Private	C, S	18%	French	News	Adv.
MTV EUROPE	Private	C, S	17%	English/Other Languages	Music	Adv.
EUROSPORT	Private	C, S	19%	French/Other Languages	Sport	Adv.
TV5 EUROPE	Public	C, S	20%	French	Generalist	L–F, Spon.

Sources: Médiametrie Audicabsat Nov–Dec 99

*in % of TV population 4 +

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech.Pen.*	Language	Programming	Revenue
LA UNE	Public	C, S	2%	French	Generalist	L–F, Adv.
RAI 1	Public	C, S	14%	Italian	Generalist	L–F, Adv.
TSR	Public	C, S	1%	French	Generalist	n.a.
ZDF	Public	C, S	10%	German	Generalist	L–F, Adv.

Sources: Médiametrie Audicabsat Nov–Dec 99

*in % of TV population 4 +

PAY TV (ANALOG + DIGITAL)									
Channels	Launch	Diff.	Subscr.*	Language	h/week	Programming	Cost/month	Revenue	Sales H.
CANAL +	1984	T, C, S	4 744 000	French	168	Generalist	184 FF	Sub., Adv.	Canal+
CANAL + BLEU	1996	C, S	3 495 300	French	112	Movies	184 FF	Sub., Adv.	Canal+
CANAL + JAUNE	1997	C, S	3 495 300	French	113	Movies	184 FF	Sub., Adv.	Canal+
CANAL+ VERT	1998	C, S	3 495 300	French	114	Movies, Sport	184 FF	Sub., Adv.	Canal+
CINE CINEMAS 1/2/3	1991	C, S	3 405 200	French	126	Movies	55 FF	Sub., Adv.	Thém.**
KIOSQUE	1995	C, S	4 367 500	French	126	Movies	pay p. view	Sub., Spon.	Thém.**
MULTIVISION	1992	C, S	2 780 100	French	126	Movies	29 FF	Sub., Adv.	In-house
MUZZIK	1996	C, S	2 116 400	French	126	Music	30 FF	Sub., Adv.	Thém.**
DISNEY CHANNEL	1996	C, S	3 172 000	French	130	Children	35 FF	Sub., Spon.	In-house
XXL	1996	C, S	1 666 200	French	133	Erotic	66 FF	Sub., Adv.	Europe**
CINE CLASSICS	n.a.	C, S	3 278 800	French	105	Movies	55 FF	Sub., Adv.	Thém.**
CINEFAZ	1999	S	2 174 400	French	126	Movies	100 FF	Sub., Adv.	M6 Publ.
CINESTAR 1/2	1997	C, S	2 336 400	French	126	Movies	100 FF	Sub., Adv.	M6 Publ.
CINETOILE	1997	C, S	2 315 500	French	126	Movies	100 FF	Sub., Adv.	M6 Publ.
ESCALES	1996	C, S	3 389 300	French	168	Discovery	79 FF	Sub., Adv.	Europe**
ACTION	n.a.	S	681 300	French	133	Movies	66 FF	Sub., Adv.	Europe**
ANIMAUX	1996	C, S	1 348 400	French	112	Documentaries	79 FF	Sub., Adv.	Europe**
CHASSE ET PÊCHE	1996	C, S	887 000	French	140	Discovery	66 FF	Sub., Adv.	Europe**
MANGAS	1996	S	657 400	French	133	Children	66 FF	Sub., Adv.	Europe**
TCM	n.a.	S	2 909 500	French	168	Movies	55 FF	Sub., Adv.	In-house

Source: Mediametrie Audicabsat Nov–Dec 99 (techn. penetration of optionnal channels on digital bouquets in % of TV population 4 +)

*Canal + = households subscribers, **Régie

PAY TV (DIGITAL PACKAGES AND DIGITAL SERVICES)									
Channels	Launch	Diff.	Decoder	Subscribers	Language	h/week	Programming	Cost/m.	Sales H.
TPS	Dec 96	S	Viaccess*	2 387 500	French	> 120	Sub., Adv.	100 FF	***
CANALSATELLITE	Apr 96	S	Mediasat**	4 106 700	French	> 120	Sub., Adv.	110 FF	****

Sources: Mediametrie Audicabsat Nov–Dec 99: Subscribers aged 4 +

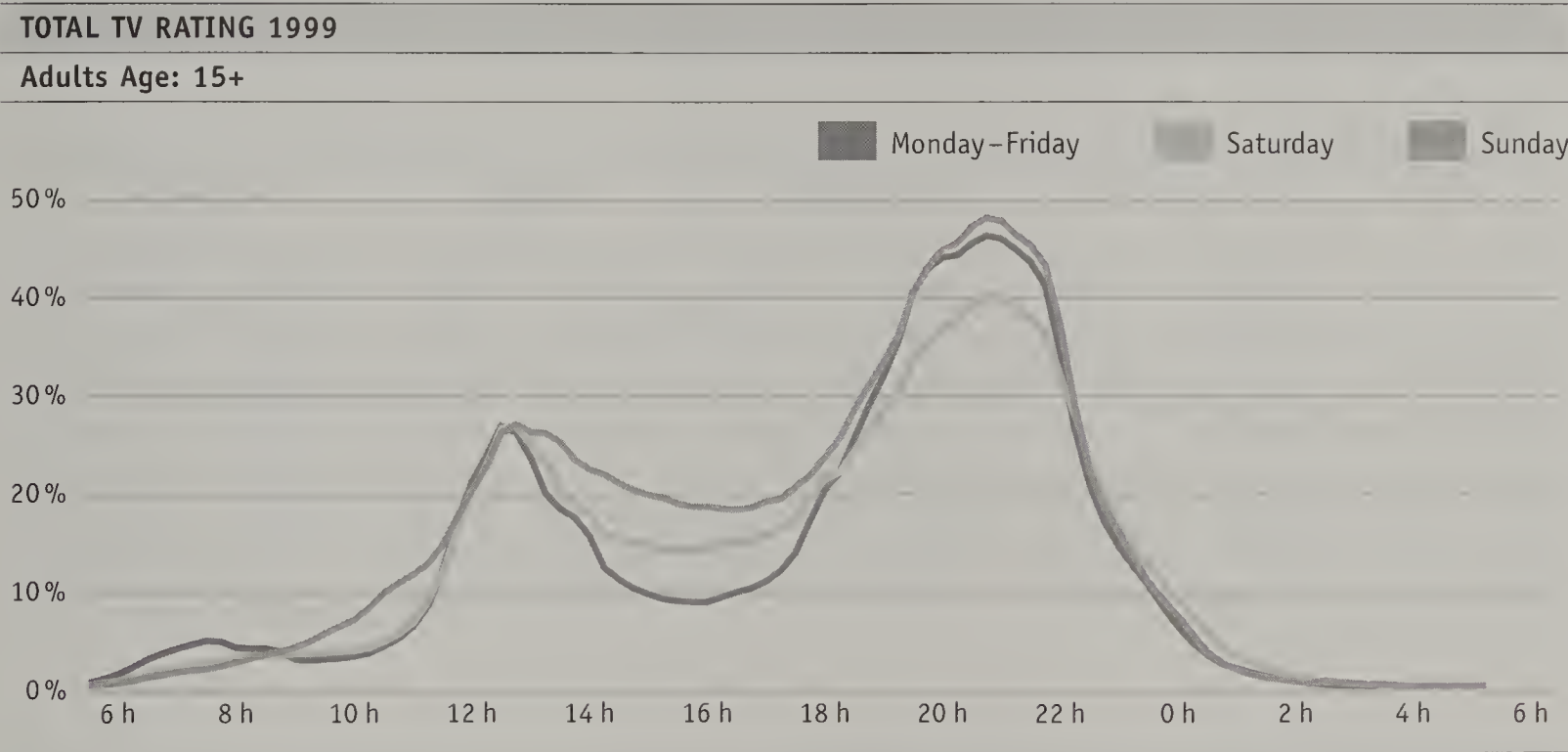
*interactivity motor : open TV **media highway

IP France, TF 1 (France Télévision Publicité), M6 Publicité, France Espaces and Europe régies, *IP France, Thématique régie, Europe régies

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	Médiamétrie/Médiamat
Panel/ Sampling Size	2 300 households/2 750 since Oct. 99
Instrument used (people-meter, telefon, face-to-face)	People-meter
Population size in 000	
Individuals 4+	52 810
Adults 15+	45 010
Housewives <50	10 190
Young Adults 15–34	14 390
Children 4–10	4 820

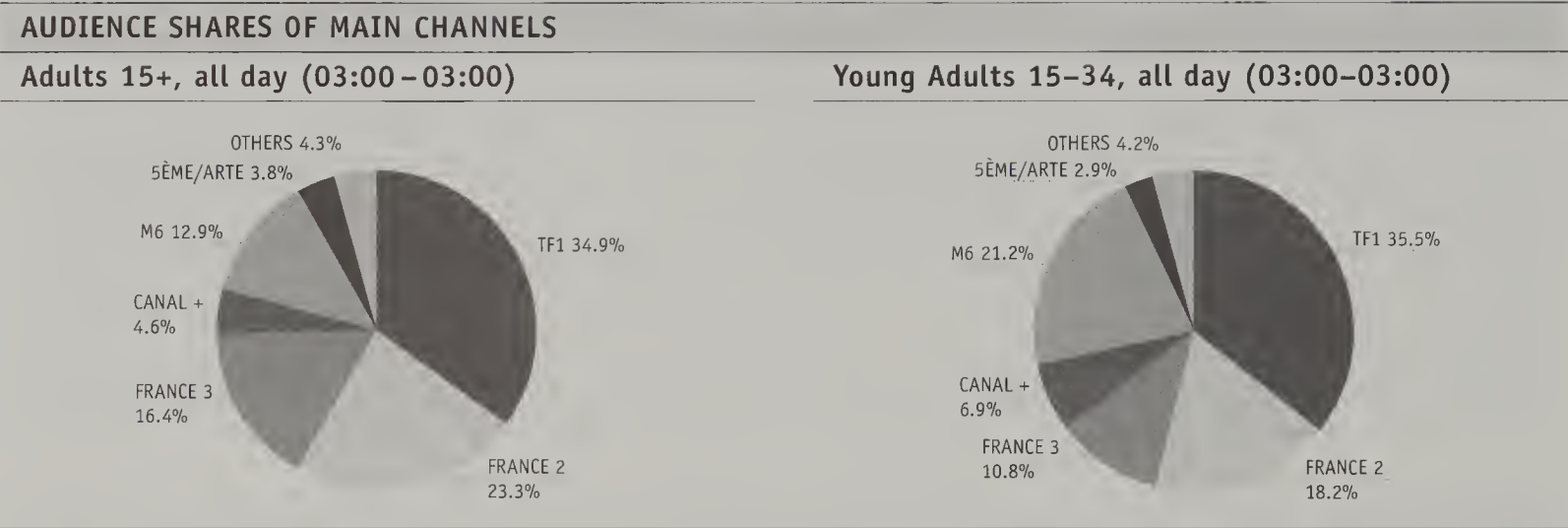
Source: Mediamat-Médiametrie



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 15+			Children 4–10			Young Adults 15–34			Housewives < 50		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	84.0	85.0	85.2	86.4	89.6	89.2	83.0	85.0	84.7	77.0	79.0	79.6
Viewing time per Viewer	229	231	234	117	132	137	178	183	187	225	232	237
Viewing time per Individual	192	197	199	101	118	122	148	156	158	174	183	188

Source: Mediamat-Médiametrie

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 03:00–03:00								
	Adults 15+		Young Adults 15–34		Children 4–10		Housewives < 50 Years	
	1998	1999	1998	1999	1998	1999	1998	1999
TF 1	34.8%	34.9%	35.8%	35.5%	40.3%	38.0%	37.6%	37.4%
FRANCE 2	23.4%	23.3%	18.1%	18.2%	12.6%	11.8%	20.0%	19.8%
FRANCE 3	17.2%	16.4%	11.4%	10.8%	17.2%	18.2%	12.7%	12.2%
CANAL +	4.7%	4.6%	6.9%	6.9%	4.4%	4.2%	4.9%	5.0%
M6	12.3%	12.9%	20.1%	21.2%	17.3%	19.7%	18.0%	19.0%
5ÈME/ARTE*	3.6%	3.8%	2.8%	2.9%	2.2%	2.0%	3.0%	3.0%
OTHER	4.0%	4.3%	4.9%	4.2%	5.8%	6.0%	3.8%	3.6%

* La Cinquième: 6h-19h/Arte: 19h-3h

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 15+		Young Adults 15–34		Children 4–10		Housewives < 50 Years	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6–19 h	19–22 h	6–19 h	19–22 h	6–19 h	19–22 h	6–19 h	19–22 h
TF 1	35.2%	34.1%	36.0%	33.8%	36.6%	39.2%	38.2%	35.7%
FRANCE 2	25.5%	21.4%	18.1%	17.8%	9.6%	14.6%	19.5%	19.2%
FRANCE 3	14.4%	20.0%	10.7%	12.3%	22.6%	11.6%	11.2%	14.5%
CANAL +	4.0%	5.4%	6.1%	8.8%	3.1%	6.4%	4.4%	6.5%
M6	11.9%	12.6%	21.0%	21.7%	18.8%	22.1%	19.2%	18.8%
5ÈME/ARTE*	4.5%	3.2%	3.5%	2.2%	2.3%	1.4%	3.6%	2.4%
OTHER	4.6%	3.3%	4.5%	3.4%	6.8%	4.7%	3.9%	2.9%

Sources: Médiamétrie/Médiamat

* La Cinquième: 6h-19h/Arte: 19h-3h

CABLE/SATELLITE UNIVERSE, INDIVIDUALS 15+ ALL DAY (00H–24H)		
	Adults age 15+	
	1998	1999
TF 1	27.7%	27.5%
FRANCE 2	16.5%	16.4%
FRANCE 3	10.6%	10.9%
M6	9.7%	8.7%
C+	6.5%	5.9%
RTL 9	3.8%	3.7%
EUROSPORT FRANCE	2.5%	2.0%
5ÈME/ARTE	2.0%	1.8%
CANAL + BLEU/JAUNE/VERT	n.a.	1.6%
CINE CINEMAS 1/2/3	1.1%	1.5%
CINESTAR 1/2	1.4%	1.4%
LCI	1.5%	1.3%
13E RUE	1.0%	1.2%
CINEFAZ	n.a.	0.9%
TMC	1.2%	0.8%
VOYAGE	0.6%	0.7%
PARIS 1ÈRE	0.8%	0.7%
MTV	0.4%	0.3%
PLANÈTE/PLAN2/FORUM	n.a.	0.6%
MCM	0.6%	0.6%
SÉRIE CLUB	0.8%	0.7%
PATHÉSPORT	0.2%	0.3%
OTHERS	11.1%	10.5%

Sources: Médiamétrie Audicabsat Nov–Dec 1999 and Nov–Dec 1998

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
RUGBY W. CUP FRANCE-AUSTRALIA	France	TF 1	Sport	15:50	06/11	28.9%	80.1%
TF 1 20 HEURES		TF 1	News	19:58	19/11	28.5%	63.9%
TF 1 20 HEURES		TF 1	News	19:58	20/11	28.4%	65.9%
TF 1 20 HEURES		TF 1	News	19:58	21/11	28.2%	53.4%
TF 1 20 HEURES		TF 1	News	19:59	26/12	26.8%	54.7%
RUGBY W. CUP CEREMONY	France	TF 1	Sport	18:02	06/11	26.3%	75.4%
JULIE LESCAUT		TF 1	Series	20:58	28/10	25.2%	51.2%
LES CORDIER JUGE ET FLIC		TF 1	Series	20:58	18/11	24.3%	50.4%
TF 1 20 HEURES		TF 1	News	19:58	22/11	24.3%	47.7%
THE FUGITIVE		TF 1	Movie	20:56	21/11	24.2%	47.8%
NAVARRO	France	TF 1	Series	20:54	18/03	24.1%	51.3%
JULIE LESCAUT	France	TF 1	Series	20:55	18/02	24.0%	47.0%
PRETTY WOMAN	USA	TF 1	Movie	20:52	21/02	23.9%	46.9%
NAVARRO	France	TF 1	Series	20:56	11/02	23.8%	47.5%
UNE FEMME D HONNEUR	France	TF 1	Series	20:54	11/03	23.4%	50.3%
FBAL ENGLAND-FRANCE	France	TF 1	Sport	20:46	10/02	23.4%	48.0%
TF 1 20 HEURES		TF 1	News	19:58	25/03	23.4%	46.4%
JULIE LESCAUT		TF 1	Series	20:57	29/04	23.1%	48.5%
UNE FEMME D HONNEUR		TF 1	Series	20:55	07/10	23.0%	49.7%
FBAL FRANCE-ARMENIA		TF 1	Sport	20:33	31/03	22.8%	47.1%

Sources: Médiamat/Médiamétrie (target: adults 15+)

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
THE FUGITIVE	USA	TF 1	20:56	21/11	24.2%	47.8%
PRETTY WOMAN	USA	TF 1	20:52	21/02	23.9%	46.9%
LES VISITEURS	France	TF 1	20:56	16/03	20.5%	45.4%
INSPECTEUR LABAVURE	France	TF 1	20:55	12/01	20.4%	42.1%
DIDIER	France	TF 1	21:04	18/05	19.7%	44.8%
FATHER OF THE BRIDE	USA	TF 1	20:56	09/02	19.7%	40.7%
GOLDENEYE	USA	TF 1	20:54	02/03	19.5%	40.5%
UN AMOUR DE SORCIERE	France	TF 1	20:59	16/11	18.9%	42.3%
INDIANA JONES/LAST CRUSADE	USA	TF 1	20:55	16/02	18.9%	39.5%
TOUT DOIT DISPARAITRE	France	TF 1	20:56	05/10	18.8%	39.7%

Sources: Médiamat/Médiamétrie (target: adults 15+)

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
RUGBY W. CUP FRANCE-AUSTRALIA		TF 1	15:50	06/11	28.9%	80.1%
RUGBY W. CUP CEREMONY		TF 1	18:02	06/11	26.3%	75.4%
FBAL ENGLAND-FRANCE		TF 1	20:46	10/02	23.4%	48.0%
FBAL FRANCE-ARMENIA		TF 1	20:33	31/03	22.8%	47.1%
FBAL ANDORRA-FRANCE		TF 1	20:42	09/06	20.4%	44.6%
FBAL EU CUP MANCHESTER		TF 1	20:43	29/09	18.9%	39.0%
FBAL FRANCE-MAROCCO		TF 1	20:33	20/01	18.9%	37.7%
FBAL FRANCE-UKRAINE		TF 1	20:33	27/03	18.6%	42.0%
FBAL FRANCE-RUSSIA		TF 1	20:33	05/06	17.6%	43.9%
FBAL UEFA MARSEILLE-BOLOGNE		TF 1	20:37	06/04	17.5%	35.9%

Sources: Médiamat/Médiamétrie (target: adults 15+)

Top Programmes Channel by Channel

TF 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
UNE FEMME D HONNEUR	France	Series	6	21:00	105	20.9%	45.8%
JULIE LESCAUT	France	Series	10	21:00	98	20.9%	45.2%
NAVARRO	France	Series	11	21:00	93	20.3%	44.2%
LES CORDIER JUGE ET FLIC	France	Series	10	21:00	102	20.3%	44.3%
TRAMONTANE	France	TV Fiction	5	21:00	101	18.4%	44.3%
FBAL FRENCH TEAM	France	Sport	4	21:00	128	18.4%	41.3%
COMBIEN CA COUTE	France	Magazine	14	21:00	133	17.3%	40.9%
LE JUGE EST UNE FEMME	France	Series	5	21:00	99	17.2%	39.6%
JOSEPHINE PROFES. ANGE GARDIEN	France	Series	4	21:00	100	17.2%	35.3%
TF 1 20 HEURES	France	News	364	20:00	40	17.1%	41.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
RUGBY W. CUP FRANCE-AUSTRALA		Sport	06/11	15:50	140	28.9%	80.1%
RUGBY W. CUP CEREMONY		Sport	06/11	18:02	n.a.	26.3%	75.4%
THE FUGITIVE	USA	Movie	21/11	20:56	130	24.2%	47.8%
PRETTY WOMAN	USA	Movie	21/02	20:52	120	23.9%	46.9%
FBAL ENGLAND-FRANCE		Sport	10/02	20:46	130	23.4%	48.0%
FBAL FRANCE-ARMENIA		Sport	31/03	20:33	127	22.8%	47.1%
MISS FRANCE	France	Variety Show	11/12	20:52	160	21.2%	51.3%
LES VISITEURS	France	Movie	10/03	20:56	110	20.5%	45.4%
FBAL ANDORRA-FRANCE		Sport	09/06	20:42	120	20.4%	44.6%
INSPECTEUR LABAVURE		Movie	12/01	20:55	100	20.4%	42.1%

Sources: Médiamat/Médiamétrie (target: adults 15+)

FRANCE 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
L'INSTIT	France	Series	8	20:59	88	15.5%	31.9%
JOUR APRES JOUR	France	Magazine	4	20:52	124	12.7%	27.2%
LE PLUS GR. CABARET DU MONDE	France	Entertainment	6	20:58	123	12.0%	32.3%
MAITRE DA COSTA	France	Series	4	20:56	81	11.9%	27.1%
P.J	France	Series	6	21:29	49	11.7%	27.2%
LA CRECHE	France	Series	4	21:27	52	11.1%	25.2%
AVOCATS ET ASSOCIES	France	Series	6	21:54	51	10.7%	27.0%
QUAI N 1	France	Series	5	20:58	87	10.6%	25.1%
CA SE DISCUTE JOUR APRES JOUR	France	Magazine	4	21:00	130	10.5%	23.9%
TAPIS ROUGE	France	Entertainment	10	20:56	151	10.2%	29.1%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
JUST CAUSE	USA	Movie	12/12	20:54	90	18.3%	35.0%
LES ENFOIRES	France	Entertainment	13/02	20:50	170	18.1%	42.8%
UNE SIRENE DANS LA NUIT	Fra./Belg.	TV Fiction	15/09	20:56	90	17.8%	38.6%
LA GRANDE VADROUILLE	France	Movie	26/12	20:58	120	17.5%	38.1%
LA PETITE FILLE II	France	TV Fiction	19/10	20:55	85	17.1%	32.6%
LA RIVALE	Fra./Belg.	TV Fiction	29/09	20:56	95	16.7%	34.2%
LA PETITE FILLE I	France	TV Fiction	18/10	20:55	91	16.2%	32.0%
DIE HARD	USA	Movie	09/03	20:55	123	16.1%	35.1%
LE PORTEUR DE DESTINS	France	TV Fiction	04/01	20:55	94	16.1%	30.7%
UNFORGIVEN	USA	Movie	28/02	20:54	121	16.0%	22.5%

Sources: Médiamat/Médiamétrie (target: adults 15+)

FRANCE 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
QUESTIONS POUR UN CHAMPION*	France	Game Show	5	20:54	104	12.7%	27.1%
ACTUALITES REGIONALES	France	News	356	19:07	18	12.5%	40.3%
DOCTEUR SYLVESTRE	France	Series	7	20:54	89	10.5%	23.5%
19-20 RENDEZ-VOUS DE L'INFORM.	France	News	407	19:27	22	10.0%	30.5%
FBAL-COUPÉ DE LA LIGUE	France	Sport	8	20:26	155	9.8%	22.1%
LE JOURNAL DU DAKAR	France	Sport	17	20:36	12	9.7%	19.9%
MELISSOL	France	Series	7	21:16	53	9.6%	18.9%
QUESTIONS POUR UN CHAMPION*	France	Game Show	6	18:19	27	9.3%	43.4%
LES BETISES DE M. PIERRE	France	Entertainment	6	21:31	110	9.0%	25.2%
19-20 EDITIONS LOCALES	France	News	306	18:56	5	8.9%	34.1%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
LA FEMME DU BOULANGER	France	TV Fiction	06/07	20:55	90	16.9%	34.2%
FBAL UEFA		Sport	12/05	19:40	152	16.2%	37.2%
LES GRANDES GUEULES	France	Movie	22/03	20:53	124	15.6%	34.1%
POUR LE RIRE ET LE MEILLEU	France	Humour	30/03	20:53	112	15.5%	32.4%
QUI MANGE QUI	France	TV Fiction	20/05	20:58	88	15.0%	32.8%
THE SPECIALIST	USA	Movie	02/12	20:59	105	13.5%	28.1%
ASSASSINS	USA	Movie	08/03	20:54	122	13.0%	27.2%
DESSINE MOI UN JOUET	France	TV Fiction	18/12	20:56	120	12.8%	30.8%
FBAL COUPÉ DE LA LIGUE		Sport	10/01	20:29	166	12.8%	25.8%
LES COQUELICOTS	France	TV Fiction	20/03	20:56	90	12.6%	31.2%

Sources: Médiamat/Médiamétrie (target: adults 15+)

* les masters

M6							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
LES PRODUITS STARS	France	Magazine	48	20:44	7	7.1%	15.0%
LES MOMENTS DE VERITE	France	Magazine	5	21:36	110	6.9%	17.3%
PASSE SIMPLE	France	Magazine	39	20:44	7	6.9%	14.8%
X FILES	USA	Series	23	21:21	47	6.9%	14.6%
THE PRETENDER	USA	Series	28	21:02	47	6.3%	15.0%
SEVEN DAYS	USA	Series	17	18:51	52	6.2%	18.3%
6 MINUTES	France	News	360	19:53	11	6.2%	14.9%
CHARMED	USA	Series	27	20:55	46	6.1%	16.5%
POLITIQUEMENT ROCK	France	Magazine	54	20:44	7	6.1%	14.8%
THE SENTINEL	USA	Series	17	21:48	47	6.0%	14.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
CORRINA CORRINA	USA	Movie	11/01	20:56	90	13.3%	26.6%
TURNER AND HOOCH	USA	Movie	08/02	20:57	100	12.0%	23.7%
SPECIES	USA	Movie	29/03	21:00	104	10.8%	21.9%
LE BOULANGER	France	Movie	21/01	21:00	103	10.4%	22.9%
SABRINA	USA	Movie	25/10	20:56	125	9.9%	20.6%
MEURTRE EN SUSPENS	USA	Movie	08/11	20:54	90	9.9%	19.1%
OPERATION DRAGON	USA	Movie	15/02	20:56	100	9.8%	19.4%
BLINK	USA	Movie	27/09	20:57	104	9.5%	20.1%
JUGE ET PARTIE	France	TV Fiction	19/05	20:56	96	9.4%	20.4%
MONEY TRAIN	USA	Movie	15/03	20:58	106	9.4%	20.3%

Sources: Médiamat/Médiamétrie (target: adults 15+)

CANAL +							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
LA SEMAINE DES GUIGNOLS	France	Entertain.	78	11:04	27	2.9%	16.3%
FBAL CHAMPIONNAT DE France	France	Sport	31	20:14	26	2.9%	6.8%
NULLE PART AILLEURS	France	Entertain.	267	18:30	120	2.3%	6.7%
LE VRAI JOURNAL	France	News	80	10:38	47	2.1%	12.4%
RIONS UN PEU	France	Entertain.	5	14:47	42	2.1%	8.5%
THE SIMPSONS	USA	Cartoon	66	19:54	22	2.1%	6.1%
LE JOURNAL DU CINEMA	France	Magazine	42	20:16	24	1.9%	4.2%
LES 10 PREMIERES ANNEES	France	Entertain.	17	16:06	26	1.8%	7.6%
ALLONS AU CINEMA CE WEEK END	France	Magazine	29	19:43	22	1.8%	4.4%
MAGAZ.TV +	France	Magazine	66	08:00+19:00	57	1.7%	8.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
L ANNEE DU ZAPPING\1999	France	Entert./News	03/01	12:39	120	6.4%	20.6%
LE VRAI JOURNAL	France	News	25/04	13:30	31	5.4%	20.5%
LE NUIT DES CESARS LA 24	France	Entertainment	06/03	20:30	147	5.1%	12.3%
MAG CLOTURE DU FESTIVAL	France	n.a.	23/05	19:28	47	4.8%	17.1%
FBAL CHMP	France	Sport	10/11	20:44	20	4.4%	9.5%
FBAL CHMP	France	Sport	12/10	20:16	31	4.3%	9.1%
FBAL CHMP	France	Sport	29/01	20:16	18	4.3%	9.5%
FBAL CHMP	France	Sport	07/11	20:14	31	3.8%	7.3%
LES DESSIN ANIME HIP HIP HURRY	France	Cartoon	19/09	19:51	5	3.7%	9.8%
FBAL CHMP	France	Sport	15/10	20:15	30	3.6%	8.1%

Sources: Médiamat/Médiamétrie (target : adults 15+)

LA CINQUIEME							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
LES CINQ DERNIERES MINUTES	France	Series	14	16:15	87	1.6%	9.8%
LA COULEUR DE L AFRIQUE	n.a.	Docum.	5	17:57	25	1.5%	8.4%
RIPOSTES	France	Magazine	10	18:04	50	1.5%	5.0%
LE SENS DE L HISTOIRE	France	Magazine	39	16:22	84	1.3%	6.4%
LES GEANTS DU SIECLE	France	Docum.	11	14:00	55	1.2%	4.7%
COUPLES LEGEND. DU 20EME SIECLE	France	Docum.	59	14:38	25	1.1%	7.5%
NATIONAL GEOGRAPHIC	USA	Docum.	14	15:43	25	1.1%	6.3%
COTE 5IEME C EST BIEN C’EST MALE	France	Magazine	11	17:58	26	1.1%	5.9%
THE FUGITIVE	USA	Series	21	15:51	49	1.1%	1.1%
100 POUR 100 QUESTION	France	Game	10	14:46	23	1.0%	5.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
LA TULIPE NOIRE	France	Movie	01/11	16:31	110	2.9%	14.3%
LE GORILLE VOUS SAULE BIEN	France	Movie	22/02	16:41	100	2.6%	17.3%
ALLEZ France	Fr./Italy	Movie	15/02	16:54	90	2.5%	14.6%
LES TROIS MOUSQUETAIRE	France	Movie	10/04	16:30	111	2.5%	20.5%
FLIC STORY	France	Movie	26/04	16:33	107	2.4%	20.5%
CASQUE D’OR	France	Movie	12/04	16:45	94	2.4%	17.8%
UN DROLE DE PAROISSIEN	France	Movie	08/11	17:01	80	2.4%	17.0%
CLASSE TOUS RISQUES	France	Movie	01/03	16:40	103	2.4%	17.5%
LÍBIS ROUGE	France	Movie	25/01	17:07	76	2.2%	15.1%
LE TRAIN	France	Movie	04/01	16:45	96	2.2%	15.5%

Sources: Médiamat/Médiamétrie (target : adults 15+)

ARTE							
Top 10 Recurrent Programmes	Land	Genre	Start.Time	Length (m.)	Audience	Share	
LES MYSTERES DE L HISTOIRE	France	Doc um.	20:50	52	2.0%	6.5%	
SERIE NOIRE AU CREDIT LYONNAIS	France	Docum.	20:55	69	1.7%	3.6%	
HEIMATFRONT	n.a.	Docum.	20:44	56	1.7%	3.5%	
LES MERCREDIS DE L'HISTOIRE	France	History	21:14	60	1.5%	3.8%	
PEPE CARVALHO	Spain	Series	23:01	90	1.4%	6.1%	
KINOCINE	France	Movie	20:45	240	1.3%	4.5%	
SI LES BETES POUVAIENT PARLER	n.a.	Docum.	19:01	41	1.3%	3.6%	
BIENVENUE AU GRAND MAGASIN	France	Feuilleton	20:16	27	1.3%	3.0%	
A L'ECOLE HOTELIERE	France	Feuilleton	20:15	28	1.3%	2.7%	
PRISE D'OTAGES EN DIRECT	n.a.	TV Fiction	22:57	86	1.2%	5.3%	

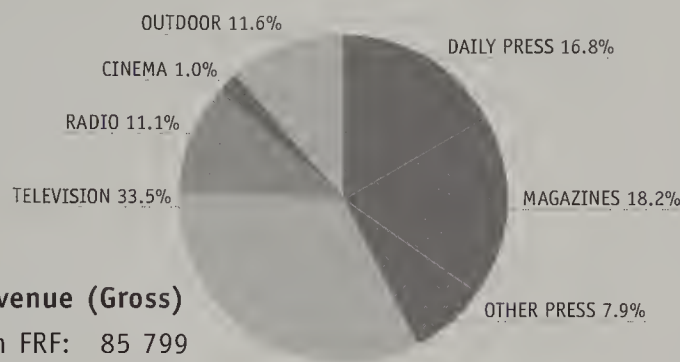
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
QUAI DES ORFEVRES	France	Movie	10/01	20:42	102	5.7%	10.4%
LITTLE BIG MAN	USA	Movie	25/04	20:49	134	5.1%	11.5%
SOLOMON AND SHEBA	USA	Movie	07/11	20:43	135	5.0%	9.8%
NO CHILD OF MINE	UK	TV Fiction	12/11	20:46	81	4.8%	10.0%
LES GRANDES FAMILLES	France	Movie	11/04	20:48	90	4.7%	9.4%
SONS OF THE DESERT	USA	Movie	20/12	20:46	62	4.7%	9.3%
MA TERRE	France	TV Fiction	29/10	20:44	90	4.6%	10.2%
DALIDA LE GRAND VOYAGE	France	Docum.	07/03	20:42	121	4.6%	9.0%
THE MUSIC BOX	USA	Short Movie	20/12	21:50	27	4.5%	9.3%
BELLA BLOCK	Germany	TV Fiction	12/02	20:48	96	4.1%	8.0%

Sources: Médiamat/Médiamétrie (target : adults 15+)

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million FRF)	85 799
Total adspend	(in million USD)	13 139
Total adspend	(in million EUR)	13 080
TV adspend	(in million FRF)	28 731
TV adspend	(in million USD)	4 400
TV adspend	(in million EUR)	4 380
TV adspend	in % of GDP	0.33
TV adspend	per capita (USD)	73.0

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

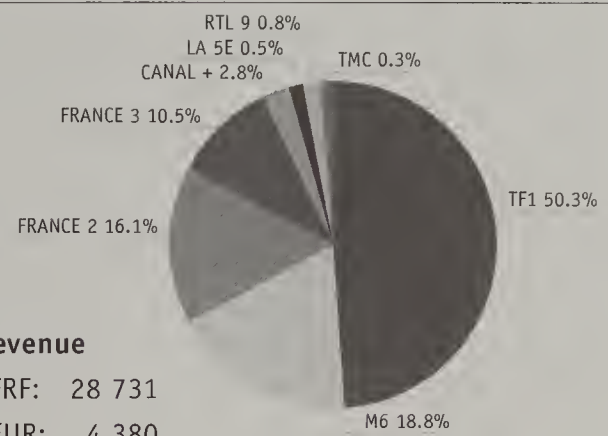


Total Revenue (Gross)
in million FRF: 85 799
in million EUR: 13 080

TV ADVERTISING STATISTICS	
Total number of spots broadcast	577 840
Average spot length (in sec.)	21.0
Total number of advertisers	30 906
Number of TV advertisers	1 220
Total number of advertised products	56 266
Number products advertised on TV	4 263

Source: SECODIP

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue
in million FRF: 28 731
in million EUR: 4 380

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
FOOD	9248	7347	79.4%	25.6%
COSMETICS, TOILETERIES	6696	3745	55.9%	13.0%
PUBLISHING	4693	3043	64.8%	10.6%
TRANSPORT	8612	2998	34.8%	10.4%
PROPRETY	2051	1886	92.0%	6.6%
TELECOMMUNICATIONS	6351	1735	27.3%	6.0%
SERVICES	5988	1554	26.0%	5.4%
CULTURE, LEISURE	4484	1111	24.8%	3.9%
DRINKS	2714	901	33.2%	3.1%
TRAVEL, TOURISM	2836	715	25.2%	2.5%
Other	32119	3690	11.5%	12.8%
TV Advertisers				
NESTLE FRANCE	1196	840	70.2%	2.9%
PROCTER & GAMBLE FRANCE	885	790	89.3%	2.7%
UNIVERSAL MUSIC	919	630	68.6%	2.2%
HENKEL FRANCE	702	622	88.6%	2.2%
FERRERO FRANCE	574	564	98.3%	2.0%
RENAULT AUTOMOBILES	1425	513	36.0%	1.8%
L'OREAL PARFUMERIE	611	488	79.9%	1.7%
KRAFT JACOB SUCHARD	589	487	82.7%	1.7%
DANONE	465	422	90.8%	1.5%
CITROEN AUTOMOBILES	814	399	49.0%	1.4%
Other	77612	22970	29.6%	79.9%
Total (in million FRF)	85 799	28 731	33.5%	100.0%
Total (in million EUR)	13 080	4 380	33.5%	100.0%

Source: SECODIP

Germany

On the eve of the new millenium, the German Free TV sector is broken down into three blocks comprising two powerful private ownership groups and an equally strong public sector. The Kirch Group is now in control of five free TV stations (SAT.1, Pro Sieben, Kabel 1, DSF and newly founded news channel N24), while CLT-UFA controls the RTL group which includes RTL, RTL II, Super RTL and Vox. Together with the public channels, the three groups account for a 94% market share in viewers, while the two private groups receive over 90% of total TV ad expenditure.

Since 1999, most free TV stations have been operating profitably. At the same time, the major stations have been approaching the legal limits of their advertising capability – additional revenues have to be generated by increasing prices, fully exploiting license rights within the respective groups and developing new markets like merchandising. Similarly, the TV ownership groups are trying to extend their portfolio to cover the entire supply chain, as indicated by the merger between Pearson TV and CLT UFA. Given all this, there is very little room left for independent free TV stations.

In the pay TV market, the alliance between Kirch and Rupert Murdoch (who owns a 24% share in Kirch’s Pay TV holding) still enjoys a monopoly. Premiere World, their Pay TV bouquet, had some 2.13 million subscribers at the end of the first quarter 2000. The target for the end of 2000 is 2.9 million subscribers, which many analysts perceive as difficult to obtain in a market where an average household receives 36 channels, most of them in the local language. Deregulation of the country’s cable networks (formerly controlled by Deutsche Telekom) is expected to be completed by late 2000. The new investors are likely to play a more active role in the distribution of content. In the medium term, this will lead to new packages in pay TV, pay-per-view and interactive services.

As a consequence of the continual rise in stock markets, numerous media and merchandizing companies have had previously unthinkable infusions of capital. With the German market being too small for all this money, they are likely to take a more global perspective in their business plan – as demonstrated by EM.TV, which acquired the Jim Henson Company and a 50% stake in the Formula One Group. Stock capital also seems to be strengthening the program producer’s position. There are now examples where local film producers offer their programs on a license basis while retaining the rights for their productions – a rather unfamiliar situation for German TV stations. In 1999 TV consumption decreased: while adults (14+) watched 198 minutes per day on average, which indicates a drop of three minutes, the TV viewing of children (3–13) went down by two minutes to 97 minutes per day. Even though there was an increase in programs to chose from, TV consumption of the total viewers (> 3 years old) showed a decline of three minutes: they watched 185 minutes per day on average. This regression is clearly explained by the lack of big sport events in 1999. Overall, market configuration was stable.

Although the license rights for the Champions’ League passed to Murdoch’s tm3, RTL continued to be the market leader in the 14–49 age group. Nevertheless, in 1999 all big TV stations lost audience share to smaller stations: the market shares of the small private stations as well as the regional or local channels improved. From 1999 until now there has been no major programming restructuring in the schedules of German broadcasters. But declining growth rates in the television market have forced broadcasters to cut programming cost. This has resulted in a continuing shift away from US programming to local German programming, which tends to be low budget rather than expensive “home grown” production. Therefore, one of the favorite genres in 1999 was the so-called docusoap, a genre which was imported from the United Kingdom. Taking voyeuristic shows one step further RTL II has successfully adopted the Dutch real life soap “Big Brother”. Despite many public discussions involving ethical and moral issues and a slow start, the show achieved top ratings, especially among the 14- to 49-year old age group, and has since attracted many imitators. Another format which has found its way to the German market from abroad is the British hit “Who wants to be a Millionaire”, which gave RTL top ratings in the fall of 1999. The success of “Who wants to be a Millionaire” has caused a renaissance of the believed to be dead “question and answer” game show.

In 1999 the German TV ad market grew at a rate of 6.2 %, thus for the first time since 1991 TV advertising is growing at a higher rate than in the previous year. Almost three quarters of the 13.6 billion marks spent on advertising were split between the big three networks RTL (3.8 billion marks), Sat.1 (3.1 billion marks) and Pro Sieben (2.8 billion marks). Prices for spots increased slightly in 1999. Shorter spots in particular have become more expensive since the beginning of 2000 because some broadcasters introduced disproportional prices in order to stop the trend toward ever shorter spots. Though more liberal advertising laws have come into force only since April 2000, some of the commercial stations have anticipated deregulation by introducing split-screen ads during Formula 1 and broadcasting virtual ads in fall 1999. Further deregulation introduced in April 2000 allows broadcasters to slightly reduce the 20-minute interval between ad breaks and to broadcast single isolated spots instead of blocks. But in spite of this, the legislation still restricts ad share per hour by 20%.

Germany

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General Data

COUNTRY	
Land area (km ²)	356 974
Total population	82 037 000
Number of households	37 795 000
Average household size	2.2
In % of households/population equipped	
Phone	99.0/n.a.
Mobile telephone subscribers	n.a./25.0
PC's	45.0/n.a.
Internet access	18.0 ² /46.0 ¹
Internet users	n.a./30.0 ¹

Sources: Stat. Bundesamt, Dt. Telekom AG; ¹GfK Online Monitor 5, Nov. 99–Jan. 00 (basis 14–69 year old individuals), ²European Media Watch

TV OVERVIEW	
Total number of TV households (TVHH)	33 560 000
In % of all households	95.8
Numbers of channels received by 70% of the population	36
TV License-Fee cost per year	DEM 339.–/EUR 173.–

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.9
Multiset (homes with more than 1 TV set)	29.9
VCR	70.6
Teletext	80.5
Remote control	99.7

Sources: GfK-Methodenbericht, Januar 2000, GfK-Fernsehforschung, IP Germany

ECONOMICS	
GDP in million DEM (at current prices)	3 839 530
GDP per capita in DEM (at current prices)	46 802
Inflation rate in 1999 (in %)	0.6
Value of DEM in Euro (EUR)*	1 EUR = 1.96 DEM
Value of DEM in US-Dollar (USD)*	1 USD = 1.94 DEM

Sources: Stat. Bundesamt, Deutsche Bundesbank *December 1999

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	77.0
	connected	54.0
Satellite	private dish/DTH	31.0
	collective dish/SMATV	7.0
Terrestrial	analog	100.0
	digital	none
	MMDS	none

TV SUBSCRIPTION			
Analog pay TV subscribers	2.7%	Digital TV subscribers	3.9%

Sources: GfK-Methodenbericht, Januar 2000, GfK-Fernsehforschung, Dt. Telekom AG

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
ARD	1954	T, C, S	100%	German	168	Generalist	L–F, Adv.	In-house
ZDF	1963	T, C, S	100%	German	168	Generalist	L–F, Adv.	In-house
3SAT	1984	T, C, S	88%	German	168	Generalist	L–F	n.a.
KINDERKANAL	1997	C, S	77%	German	80	Children	L–F	n.a.
PHOENIX	1997	C, S	76%	German	168	Documentaries	L–F	n.a.

Sources: GfK-Methodenbericht, Januar 2000, IP Germany

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech. Pen.	Language	h/week	Programming	Revenue	Sales House
RTL	1984	T, C, S	97%	German	168	Generalist	Adv.	IP
SAT 1	1985	T, C, S	97%	German	168	Generalist	Adv.	In-house
PRO 7	1989	T, C, S	92%	German	168	Generalist	Adv.	MGM
RTL 2	1993	T, C, S	91%	German	168	Generalist	Adv.	IP
SUPER RTL	1995	T, C, S	84%	German	138	Entertainment	Adv.	IP
VOX	1993	T, C, S	92%	German	168	Generalist	Adv.	In-house
KABEL 1	1992	T, C, S	88%	German	168	Generalist	Adv.	MGM
DSF	1993	T, C, S	88%	German	168	Sport	Adv.	In-house
N-TV	1992	T, C, S	87%	German	168	News	Adv.	GWP
VIVA	1993	T, C, S	55%	German	168	Music	Adv.	In-house
VIVA 2	1995	T, C, S	43%	German	168	Music	Adv.	In-house
VH-1	1995	C, S	20%	German	168	Music	Adv.	In-house
TM 3	1995	T, C, S	77%	German	168	Entertainment	Adv.	In-house
N24	1999	C, S	n.a.	German	168	News	Adv.	MGM
ONYX	1996	C	22%	German	126	Music	Adv.	In-house
BLOOMBERG TV	1998	C, S	30%	German	168	News	Adv.	MGM
HOT	1995	C, S	47%	German	168	Teleshopping	Adv.	In-house
QVC GERMAN	1996	C, S	n.a.	German	168	Teleshopping	Adv.	In-house
QUANTUM TV	1993	S	n.a.	German	n.a.	Teleshopping	Adv.	n.a.

Sources: GfK-Methodenbericht, Januar 2000, IP Germany

DOMESTIC CHANNELS (REGIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech. Pen.	Language	h/week	Programming	Revenue	Sales House
BR ALPHA	1998	C, S	38%	German	126	Education	L-F	n.a.
BAYERN 3	1954	T, C, S	90%	German	140	Generalist	L-F	n.a.
HESSEN 3	1954	T, C, S	51%	German	168	Generalist	L-F	n.a.
NORD 3	1959	T, C, S	86%	German	168	Generalist	L-F	n.a.
B 1	n.a.	T	7%	German	n.a.	Generalist	L-F	n.a.
WEST 3	1952	T, C, S	90%	German	168	Generalist	L-F	n.a.
SWR TV	1969	T, C, S	64%	German	140	Generalist	L-F	n.a.
MDR	1992	T, C, S	83%	German	168	Generalist	L-F	n.a.
ORB	1992	T, C, S	45%	German	n.a.	Generalist	L-F	n.a.

Sources: GfK-Methodenbericht, Januar 2000, IP Germany

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diff,	Tech. Pen.	Language	h/week	Programming	Revenue	Sales House
FAB	1991	T, C	5%	German	168	Generalist	Adv.	In-house
HAMBURG 1	1995	T, C	4%	German	126	Generalist	Adv.	In-house
FRANKEN FERNSEHEN	1994	T, C	n.a.	German	168	Generalist	Adv.	In-house
TV BERLIN	1993	T, C, S	7%	German	168	Generalist	Adv.	SVG
TV MÜNCHEN	1985	T, C, S	2%	German	147	Generalist	Adv.	SVG
B. TV BADEN	1995	C, S	n.a.	German	168	Generalist	Adv.	DRF TV
SAAR TV	1996	C	1%	German	168	Generalist	Adv.	In-house
B. TV WÜRTTEMBERG	1998	C, S	n.a.	German	168	Generalist	Adv.	TV Stuttgart
TD 1	1985	C	n.a.	German	n.a.	Generalist	Adv.	In-house

Sources: GfK-Methodenbericht, Januar 2000, IP Germany

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
MTV EUROPE	Private	C, S	81.0%	English/German	Music	Adv.
EUROSPORT	Private	T, C, S	87.0%	German	Sport	Adv.
ARTE	Public	C, S	77.0%	German/French	Cultural	L–F, Spon.
NBC EUROPE	Private	C, S	37.0%	English/sub.	Generalist	Adv.
TV 5 EUROPE	Public	C, S	42.0%	French	Generalist	L–F, Spon.
CNN INT.	Private	C, S	75.0%	English	News	Adv.
TRT INT.	Private	C, S	38.0%	Turkish	Generalist	Adv.
EURO D	Private	S	62.0%	Turkish	Generalist	Adv.
BBC WORLD	Private	T, C, S	27.0%	English	News	Adv.
CNBC EUROPE	Private	S	23.0%	English	Economy	Adv.
EURONEWS	Private	C,S	35.0%	English/German/sub.	News	Adv.
TRAVEL TV	Private	S	n.a.	English	Travel	Adv.
DEUTSCHE WELLE	Public	S	n.a.	German/sub.	Generalist	L–F
SKY NEWS	Private	C, S	n.a.	English	News	Adv.
ATV	Private	S	1.0%	Turkish	Generalist	Adv., Spon.
KANAL D	Private	S	0.3%	Turkish	Generalist	Adv., Spon.

Sources: GfK-Methodenbericht, Januar 2000, IP Germany

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ORF 1	Public	T, C, S	7.0%	German	Generalist	L–F, Adv.
ORF 2	Public	T, C, S	10.0%	German	Generalist	L–F, Adv.

Sources: GfK-Methodenbericht, Januar 2000, IP Germany

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
PREMIERE	1991	C, S	900.000	German	168	Movie, Sport	DEM 34.90	Sub., Adv.	In-house

Sources: Premiere

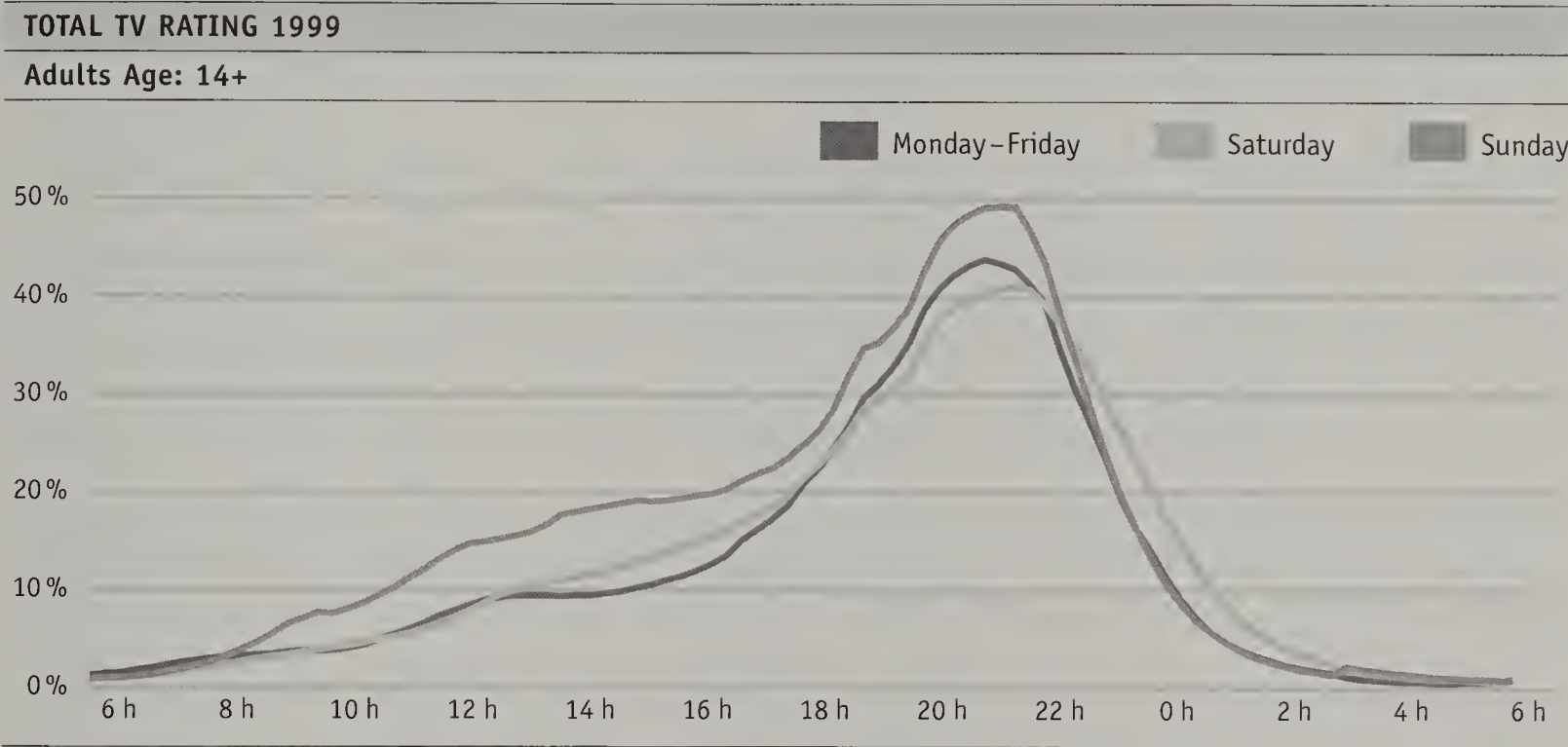
DIGITAL PACKAGES									
Channels	Launch	Diff.	Decoder	Subscr.	Language	No.of ch.	Revenue	Cost/month	Sales H.
PREMIERE WORLD	1999	C, S	d-box, NOKIA	1 300 000	German	30	Sub., Adv.	DEM 45.–	In-house

Sources: Premiere

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	GfK-Fernsehforschung
Panel/Sampling Size	5.200 Households / 9.733 Individuals
Instrument used (people-meter, telefon, face-to-face)	People-meter
Population size in 000	
Individuals 3+	71 440
Adults 14+	62 545
Main Purchase Responsibles 14+	33 587
Young Adults 14-49	35 069
Children 3-13	8 894

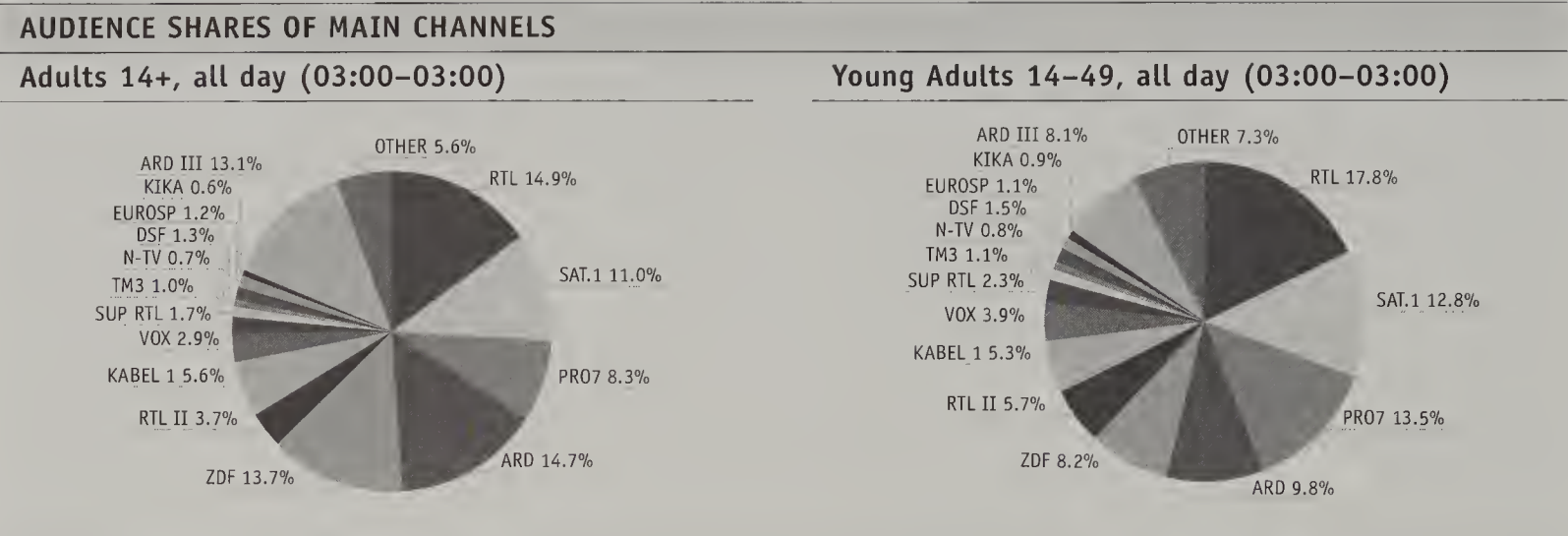
Sources: AG.MA Media Micro Census 1999, GfK-Fernsehforschung, IP Germany



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 14+			Young Adults 14-49			Children 3-13			Main Purchase Responsibles		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	73.0	74.0	73.0	68.0	69.0	68.0	60.0	62.0	61.0	77.0	78.0	78.0
Viewing time per Viewer	268	270	269	241	241	242	160	160	158	286	289	289
Viewing time per Individual	196	201	198	164	166	164	95	99	97	222	227	226

Sources: AGF/GfK-Fernsehforschung, PC#TV aktuell, IP Germany

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 03:00 – 03:00								
	Adults 14+		Young Adults 14–49		Children 3–13		Main Purchase Responsibles	
	1998	1999	1998	1999	1998	1999	1998	1999
RTL	15.1%	14.9%	17.8%	17.8%	14.5%	13.8%	15.3%	15.0%
SAT 1	12.1%	11.0%	12.9%	12.8%	6.8%	6.9%	12.2%	11.2%
PRO 7	8.5%	8.3%	13.9%	13.5%	11.9%	10.3%	7.9%	7.6%
ARD	15.9%	14.7%	11.2%	9.8%	8.2%	6.8%	16.2%	15.4%
ZDF	14.1%	13.7%	9.0%	8.2%	5.8%	5.4%	14.7%	14.4%
RTL II	3.4%	3.7%	5.0%	5.7%	8.7%	8.7%	3.1%	3.3%
KABEL 1	4.5%	5.6%	4.7%	5.3%	2.2%	2.4%	4.6%	5.7%
VOX	2.9%	2.9%	3.7%	3.9%	1.8%	1.8%	2.8%	2.8%
SUPER RTL	1.9%	1.7%	2.6%	2.3%	17.7%	18.7%	1.8%	1.7%
TM3	0.6%	1.0%	0.7%	1.1%	0.6%	1.0%	0.6%	0.9%
N-TV	0.6%	0.7%	0.6%	0.8%	0.1%	0.2%	0.6%	0.6%
EUROSPORT	1.1%	1.2%	1.1%	1.1%	0.7%	0.7%	0.9%	1.0%
Kika	0.4%	0.6%	0.7%	0.9%	8.2%	11.5%	0.4%	0.6%
ARD III	12.8%	13.1%	8.3%	8.1%	5.4%	4.7%	13.3%	13.5%
OTHER	6.0%	6.9%	7.8%	8.8%	7.2%	6.9%	5.5%	6.2%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 14+		Young Adults 14–49		Children 3–13		Main Purchase Responsibles	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6–19 h	19–23 h	6–19 h	19–6 h	6–19 h	19–6 h	6–19 h	19–6 h
RTL	15.7%	14.6%	16.9%	19.4%	9.4%	21.7%	16.1%	14.5%
SAT 1	12.1%	10.2%	13.0%	12.6%	4.5%	10.6%	12.6%	10.0%
PRO 7	9.0%	7.1%	14.6%	12.4%	10.0%	10.7%	8.4%	6.4%
ARD	15.0%	15.3%	9.4%	10.7%	6.2%	7.9%	15.6%	15.8%
ZDF	12.5%	16.0%	6.8%	10.1%	4.5%	7.1%	13.1%	16.8%
RTL II	2.7%	3.7%	4.6%	6.1%	10.3%	5.9%	2.3%	3.4%
KABEL 1	5.7%	5.3%	5.5%	4.7%	1.7%	3.3%	5.9%	5.3%
VOX	3.0%	2.4%	3.8%	3.6%	1.7%	2.0%	2.9%	2.4%
SUPER RTL	1.6%	1.8%	2.5%	2.3%	19.0%	19.2%	1.5%	1.9%
TM3	0.6%	1.2%	0.7%	1.3%	1.2%	0.8%	0.6%	1.1%
N-TV	1.0%	0.4%	1.1%	0.4%	0.2%	0.2%	0.9%	0.4%
EUROSPORT	1.7%	0.8%	1.5%	0.8%	0.7%	0.6%	1.3%	0.7%
ARD III	10.3%	15.5%	7.0%	8.5%	4.8%	4.4%	10.5%	16.2%
OTHER	9.3%	5.6%	12.7%	7.2%	25.6%	5.7%	8.1%	5.2%

Sources: AGF/GfK-Fernsehforschung, PC#TV aktuell, IP Germany

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
WANNA BET ... !?	Germany	ZDF	Variety Show	20:15	20/ 02	26.8%	53.6%
FBAL CL MÜNCHEN-MANCHESTER		RTL	Sport	20:40	26/ 05	20.9%	48.3%
FORMULA 1-BRAZIL		RTL	Sport	19:00	11/ 04	20.5%	41.6%
FBAL GERMANY-FINLAND		ZDF	Sport	20:40	31/ 03	18.8%	39.7%
FBAL GERMANY-TURKEY		ZDF	Sport	19:30	09/ 10	18.3%	43.8%
TAGESSCHAU	Germany	ARD	News	20:00	07/ 02	17.4%	31.9%
FORMULA 1-EUROPE		RTL	Sport	14:00	26/ 09	17.0%	61.0%
HEUTE-JOURNAL	Germany	ZDF	News	21:20	31/ 03	16.9%	34.8%
DOMINO-DAY 99		RTL	Variety Show	20:50	05/ 11	16.6%	37.0%
DREAM CRUISE	Germany	ZDF	Series	20:15	01/ 01	16.6%	30.2%
FBAL CL BAYERN-KIEW		RTL	Sport	21:45	21/ 04	16.5%	35.4%
BOXING SCHULZ-KLITSCHKO	Germany	RTL	Sport	23:15	25/ 09	16.5%	52.7%
ARD-BRENNPUNKT: ORKAN		ARD	Magazine	20:15	26/ 12	16.4%	34.3%
FBAL GERMANY-NORTH IRELAND		ARD	Sport	20:30	08/ 09	16.4%	37.9%
FORMUA 1-MONACO	Germany	RTL	Sport	14:00	16/ 05	16.4%	65.4%
ARD FOCUS		ARD	Magazine	20:15	09/ 02	16.1%	32.0%
FBAL BREMEN-FC BAYERN MÜNCHEN		ARD	Sport	19:30	12/ 06	15.8%	42.8%
GOLDENEYE	USA	ZDF	Movie	20:15	02/ 01	15.8%	30.8%
SCENE OF CRIME	Germany	ARD	Series-Crime	20:15	10/ 01	15.7%	26.5%
FORMULA 1-CANADA		RTL	Sport	19:00	13/ 06	15.7%	39.4%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
GOLDENEYE	USA	ZDF	20:15	02/01	15.8%	30.8%
I WILL GIVE YOU MY HUSBAND II	Germany	ZDF	20:15	05/01	14.9%	29.3%
I WILL GIVE YOU MY HUSBAND I	Germany	ZDF	20:15	03/01	13.5%	23.8%
ARCHE NOAH II	USA	RTL	20:15	25/10	13.4%	27.3%
MISSION IMPOSSIBLE	USA	PRO 7	20:15	18/04	13.3%	25.0%
ARCHE NOAH I	USA	RTL	20:15	24/10	13.1%	24.6%
INDEPENDENCE DAY	USA	PRO 7	20:15	04/04	12.5%	27.6%
THE COUNT OF MONTE CRISTO II	France	SAT 1	20:15	12/01	12.2%	24.1%
THE COUNT OF MONTE CRISTO III	France	SAT 1	20:15	13/01	12.2%	24.7%
DAS GELBE VOM EI	Germany	ZDF	20:15	25/01	12.0%	22.8%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL CL MÜNCHEN-MANCHESTER		RTL	20:40	26/05	20.9%	48.3%
FORMULA 1-BRAZIL		RTL	19:00	11/04	20.5%	41.6%
FBAL GERMANY-FINLAND		ZDF	20:40	31/03	18.8%	39.7%
FBAL GERMANY-TURKEY		ZDF	19:30	09/10	18.3%	43.8%
FORMULA 1-EUROPE		RTL	14:00	26/09	17.0%	61.0%
DOMINO-DAY 99-THE RECORD		RTL	20:50	05/11	16.6%	37.0%
FBAL CL BAYERN-KIEW		RTL	21:45	21/04	16.5%	35.4%
BOXING SCHULZ-KLITSCHKO		RTL	23:15	25/09	16.5%	52.7%
FBAL GERMANY-NORTH IRELAND		ARD	20:30	08/09	16.4%	37.9%
FORMULA 1-MONACO		RTL	14:00	16/05	16.4%	65.4%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

Top Programmes Channel by Channel

ARD							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
SCENE OF CRIME	Germany	Series–Crime	32	20:15	90	11.5%	23.1%
LOVE OR OTHER DISASTERS	Germany	Series–Family	4	20:15	90	10.2%	20.8%
MONEY OR LOVE	Germany	Game Show	8	20:15	120	10.1%	22.8%
POLIZEIRUF 110	Germany	Series–Crime	8	20:15	90	10.1%	20.6%
TAGESSCHAU	Germany	News	356	20:00	15	9.8%	24.3%
MUSIKANTENSTADL	Germany	Music	6	20:15	120	9.6%	21.7%
JULIA, AN EXCEPTIONAL WOMAN	Germany	Series–Family	4	20:15	90	9.0%	18.9%
ADELHEID AND HER MURDERS	Germany	Series–Crime	4	20:15	48	9.0%	17.8%
LINDENSTRASSE	Germany	Series–Family	52	18:40	30	8.7%	25.2%
ARD BRENNPUNKT	Germany	News	51	20:15	25	8.7%	19.5%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ARD FOCUS	Germany	Magazine	26/12	20:15	15	16.4%	34.3%
FBAL GERMANY–NORTH IRELAND		Sport	08/09	20:30	101	16.4%	37.9%
ARD FOCUS	Germany	Magazine	09/02	20:15	16	16.1%	32.0%
FBAL BREMEN–FC BAY. MÜNCHEN		Sport	12/06	19:30	160	15.8%	42.8%
FBAL GERMANY–SCOTLAND		Sport	28/04	20:30	103	15.3%	35.2%
MAINZ BLEIBT MAINZ	Germany	Live–Report	12/02	20:15	280	14.5%	38.4%
FBAL NORWAY–GERMANY		Sport	14/11	17:30	97	14.2%	37.8%
CARNEVAL IN COLOGNE	Germany	Live–Report	15/02	20:15	168	14.1%	30.9%
ARD FOCUS	Germany	Magazine	24/03	20:15	39	14.0%	28.2%
FBAL GERMANY–MOLDAVIA		Sport	04/06	20:30	106	13.8%	33.7%
ZDF							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
WANNA BET ... !?	Germany	Variety Show	7	20:15	157	22.2%	49.9%
DER ALTE	Germany	Series–Crime	11	20:15	57	10.4%	24.5%
STURMZEIT	Germany	Movie	5	20:15	88	9.6%	19.7%
DREAM CRUISE	Germany	Series	6	20:15	90	9.6%	22.1%
A CASE FOR TWO	Germany	Series–Crime	13	20:15	55	9.6%	24.2%
SISKA	Germany	Series–Crime	13	20:15	58	9.3%	22.3%
SALTO KOMMUNALE	Germany	Sitcom	6	20:15	43	9.3%	19.3%
THE COUNTRY DOCTOR	Germany	Series–Family	23	19:25	44	8.7%	22.1%
UNSOLVED CRIMES	Germany	Magazine	10	20:15	58	8.3%	19.4%
FALKENAU COTTAGE	Germany	Series–Family	13	19:25	44	8.1%	21.2%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL EU CHMP GERMANY–FINLAND		Sport	31/03	20:30	94	18.8%	39.7%
FBAL EU CHMP GERMANY–TURKEY		Sport	09/10	19:30	93	18.3%	43.8%
GOLDENEYE	USA	Movie	02/01	20:15	121	15.8%	30.8%
I WILL GIVE YOU MY HUSBAND II	Germany	Movie	05/01	20:15	89	14.9%	29.3%
I WILL GIVE YOU MY HUSBAND I	Germany	Movie	03/01	20:15	89	13.5%	23.8%
FBAL GERMANY–COLUMBIA		Sport	09/02	21:30	94	13.7%	32.3%
SKI		Sport	01/01	13:45	105	12.9%	47.9%
FBAL GERMANY–NORTH IRELAND		Sport	27/03	16:00	94	12.8%	52.6%
ZDF SPECIAL	Germany	Magazine	23/02	19:20	15	12.0%	28.4%
DAS GELBE VOM EI	Germany	Movie	25/01	20:15	86	12.0%	22.8%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

RTL							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
DOPPELTER EINSATZ	Germany	Series–Action	4	20:15	90	9.7%	19.4%
7 DAYS–7 BRAINS	Germany	Comedy Show	29	22:15	45	8.6%	25.8%
RITAS WORLD	Germany	Comedy Show	13	21:45	25	8.4%	20.0%
MEDICOPTER 117	Germany	Series–Action	17	20:15	90	8.1%	17.4%
ALARM FOR COBRA 11	Germany	Series–Action	20	20:15	45	7.8%	16.6%
DIE CLEVEREN	Germany	Series–Crime	7	21:15	45	7.5%	16.4%
THE WOMEN PRISON	Germany	Series–Crime	46	21:15	45	7.2%	16.2%
GOOD TIMES, BAD TIMES	Germany	Ser.–Daily Soap	253	19:40	25	7.1%	18.8%
RTL AKTUELL	Germany	News	261	18:45	20	6.8%	23.8%
WHO WANTS TO BE A MILLIONAIRE	Germany	Game Show	4	20:15	50	6.7%	19.1%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CL MÜNCHEN–MANCHESTER	Sport	26/05	20:40	53	20.9%	48.3%
FORMULA 1–BRAZIL	Sport	11/04	19:00	84	20.5%	41.6%
FORMULA 1–EUROPE	Sport	26/09	14:00	97	17.0%	61.0%
DOMINO-DAY 99	Variety Show	05/11	20:45	92	16.6%	37.0%
FBAL CL BAYERN–KIEW	Sport	21/04	21:45	52	16.5%	35.4%
BOXING SCHULZ–KLITSCHKO	Sport	25/09	23:15	25	16.5%	52.7%
FORMULA 1–MONACO	Sport	16/05	14:00	97	16.4%	65.4%
FORMULA 1–CANADA	Sport	13/06	19:00	86	15.7%	39.4%
FORMULA 1–FRANCE	Sport	27/06	14:00	105	15.5%	63.7%
FBAL CL KIEW–BAYERN	Sport	07/04	20:15	51	15.3%	33.0%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

SAT 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE COUNT OF MONTE CRISTO	Germ./Fra.	Miniseries	4	20:14	91	11.9%	23.0%
STEFANIE WITHOUT FAIL	Germany	Series–General	49	21:16	46	8.0%	18.7%
SOCCER	Germany	Sports	30	18:00	66	7.9%	26.7%
SYLVIA–A CLASS OF HER OWN	Germany	Series–General	6	20:14	46	7.6%	15.1%
WHEEL OF FORTUNE	Germany	Game Show	9	20:14	90	7.2%	14.9%
THE BULL FROM TÖLZ	Germany	Series–Crime	22	21:16	88	6.4%	16.0%
SWEET REVENGE	Germany	Reality Show	8	18:42	68	6.3%	12.9%
WOLFF’S DISTRICT	Germany	Series–Crime	12	20:14	46	6.3%	16.0%
TASK FORCE COLOGNE	Germany	Series–Crime	12	20:12	47	6.1%	12.2%
ALL YOU NEED IS LOVE	Germany	Talk Show	18	18:57	58	6.0%	15.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
BOXING KLITSCHKO–EROS		Sport	04/12	23:00	6	11.0%	31.3%
PRETTY WOMAN	USA	Movie	28/11	20:15	112	10.3%	19.7%
FBAL MÜNCHEN 1860–BAYERN		Sport	25/04	18:00	93	10.2%	31.7%
BOXING BACKGROUND		Sport	04/12	22:45	15	9.6%	26.2%
FBAL FC BAYERN MÜNCHEN		Sport	04/12	20:00	92	9.3%	20.9%
FBAL BAYERN MÜNCHEN–HERTHA		Sport	09/05	18:00	99	9.3%	35.9%
A DANGEROUS AFFAIR	Germany	Movie	02/03	20:15	97	9.2%	19.2%
JACK’S BABY	Germany	Movie	17/10	20:15	93	9.0%	17.6%
FBAL EINTRACHT FRANKFURT		Sport	18/09	20:00	99	8.7%	22.0%
BOXING ULRICH–MOORE		Sport	04/12	22:30	8	8.1%	20.4%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

PRO 7							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
X-FILES	USA	Series–Myster.	35	20:15	45	4.4%	9.4%
JETS	USA	Series–Action	9	20:15	46	3.9%	7.9%
EMERGENCY ROOM	USA	Series–General	11	20:15	44	3.6%	7.1%
TV TOTAL	Germany	Comedy Show	40	22:15	42	3.7%	12.8%
THE SENTINEL	USA	Series–Myster.	27	21:20	44	3.4%	8.1%
OUTER LIMITS	USA	Series–Myster.	12	21:15	42	3.4%	7.3%
LIEBE SÜNDE	Germany	Magazine	52	22:15	40	3.3%	10.9%
STREETS OF BERLIN	Germany	Series–Crime	16	20:15	100	3.1%	7.7%
CHICAGO HOPE	USA	Series–General	13	21:15	44	3.1%	6.7%
WORLD OF WONDER	Germany	Documentary	101	19:00	20	3.0%	7.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MISSION IMPOSSIBLE	USA	Movie	18/04	20:15	102	13.3%	25.0%
INDEPENDENCE DAY	USA	Movie	04/04	20:15	130	12.5%	27.6%
FORREST GUMP	USA	Movie	30/01	20:15	130	8.6%	18.9%
SCHINDLERS LIST	USA	Movie	01/11	20:15	182	8.5%	20.2%
SLEEPERS	USA	Movie	21/11	20:15	132	8.4%	17.1%
DINOSAUR	USA	Magazine	18/11	20:15	56	8.0%	16.8%
THE CLIENT	USA	Movie	17/01	20:15	112	7.9%	15.0%
MRS. DOUBTFIRE	USA	Movie	09/01	20:15	115	7.6%	15.8%
WERNER	Germany	Movie	21/03	20:15	82	7.5%	13.7%
MARS ATTACKS	USA	Movie	30/10	20:15	96	7.2%	16.2%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

RTL 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FOOLISH CAR DRIVER	Germany	Documentary	6	20:15	46	3.3%	7.0%
STARGATE	USA	Series–Myster.	53	20:15	44	3.2%	7.3%
STARGATE	USA	Series–Myster.	11	21:15	40	2.9%	6.6%
EXCLUSIVE COVERAGE	Germany	Magazine	52	22:20	36	2.4%	7.7%
PEEP	Germany	Magazine	39	22:15	49	2.2%	7.0%
X-FACTOR	USA	Series–Myster.	51	21:15	44	2.2%	5.0%
IBIZA '99–GOOD TIMES; SEX	Germany	Magazine	7	22:10	33	2.2%	6.8%
NIKITA	USA	Series–Action	11	21:15	42	2.0%	4.2%
RED LIGHT DISTRICT	Germany	Magazine	6	22:15	24	2.0%	5.7%
WALKER, TEXAS RANGER	USA	Series–Action	46	21:10	44	1.9%	3.9%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
PELICAN BRIEF	USA	Movie	29/01	20:15	132	5.5%	12.3%
THE POWER OF LOVE	USA	Movie	22/01	20:15	99	4.7%	9.9%
IN THE LINE OF FIRE	USA	Movie	05/02	21:15	82	3.9%	8.4%
THE SUPERCOP	USA	Movie	23/02	20:15	102	3.4%	7.1%
THE FUGITIVE	USA	Movie	05/03	21:15	82	3.2%	7.3%
VERHAENGNISVOLLE LEIDENSCHAFT	USA	Movie	14/01	21:15	45	3.1%	6.7%
PHILADELPHIA	USA	Movie	26/11	20:15	76	3.1%	7.4%
SNOW WHITE	USA	Movie	10/12	20:15	93	3.1%	7.1%
THE POWER OF LOVE	USA	Movie	03/09	20:15	98	3.0%	7.9%
TOO YOUNG TO DIE?	n.a.	Movie	23/09	21:15	44	3.0%	6.9%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

KABEL 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
WHEEL OF FORTUNE	Germany	Game-Show	260	19:30	31	3.6%	9.9%
DIAGNOSIS MURDER	USA	Series-Crime	28	20:15	45	2.4%	5.3%
DIAGNOSIS MURDER	USA	Series-Crime	43	21:15	45	2.4%	5.5%
MATLOCK	USA	Series-Crime	32	21:15	45	2.4%	5.6%
GEH AUFS GANZE	Germany	Game-Show	239	18:55	30	2.3%	7.5%
MATLOCK	USA	Series-Crime	52	20:15	45	2.1%	4.8%
RENEGADE	USA	Series-Crime	34	22:10	40	2.0%	6.5%
THE PERSUADERS	UK	Series-Crime	9	20:15	50	1.9%	3.8%
HUNTER	USA	Series-Crime	14	22:10	45	1.8%	6.0%
KUNG FU	USA	Series-Crime	45	22:15	42	1.6%	5.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
NOSTRADAMUS	USA	Movie	27/11	20:15	115	4.5%	10.2%
THE COUNT OF MONTE CRISTO	n.a.	Movie	21/11	20:15	98	4.4%	8.2%
SPIEL MIR DAS LIED VOM TOD	Italy/USA	Movie	12/11	20:15	167	4.1%	10.8%
DICK VAN DYKE	USA	Movie	22/12	20:15	68	3.9%	8.5%
MERMAIDS	USA	Movie	23/03	20:15	101	3.6%	7.8%
IN 80 DAYS AROUND THE WORLD	USA	Movie	10/04	20:15	150	3.4%	8.4%
AGATHA CHRISTIE	n.a.	Movie	23/08	20:15	88	3.3%	7.8%
DICK VAN DYKE	USA	Movie	15/12	20:15	68	3.3%	7.1%
CLARAS SECRETS	USA	Movie	26/10	20:15	100	3.2%	7.0%
METEOR	USA	Movie	14/11	20:15	98	3.2%	6.2%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

VOX							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MARTIAL LAW	USA	Series-Action	5	21:10	42	1.5%	3.2%
SPIEGEL TV EXTRA	Germany	Magazine	51	22:00	40	1.4%	4.2%
PROFILER	USA	Series-Crime	37	21:10	42	1.3%	3.0%
THE PRETENDER	USA	Series-Myster.	52	20:15	44	1.3%	3.0%
CAR MOTOR AND SPORT TV	Germany	Magazine	53	17:00	60	1.2%	4.9%
VOXTOURS	Germany	Magazine	51	18:15	44	1.2%	3.8%
FIRST WAVE	USA	Series-Myster.	16	20:15	42	1.2%	2.7%
SPIEGEL TV	Germany	Magazine	12	22:00	90	1.1%	4.1%
SPIEGEL TV EXTRA	Germany	Magazine	47	22:10	40	1.1%	3.3%
ALLY MCBEAL	USA	Series-General	40	22:05	42	1.0%	3.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
BLONDES HAVE MORE FUN	USA	Movie	01/02	20:15	91	3.4%	6.7%
VULKAN-BERG IN FLAMMEN	USA	Movie	17/12	20:15	84	2.9%	6.4%
SPYS LIKE US	USA	Movie	14/06	20:15	90	2.7%	6.6%
PHOENIX-LUST UND SCHMERZ	USA	n.a.	09/01	23:05	72	2.5%	8.8%
VERTIGO	USA	Movie	21/07	20:15	122	2.4%	6.6%
KILLERANTS	USA	Movie	15/10	20:15	84	2.4%	5.6%
FRENZY	USA	Movie	11/08	20:15	110	2.3%	5.8%
THE 7TH SIGN	USA	Movie	17/01	22:00	90	2.3%	7.4%
BULLIT	USA	Movie	07/01	20:15	102	2.3%	4.7%
POWERMAN III	USA	Movie	18/06	22:10	74	2.2%	7.8%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

SUPER RTL							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
PETER STEINERS THEATERSTADL	Germany	Comedy Show	56	20:15	90	2.3%	5.0%
ZUM STANGLWIRT	Germany	Comedy Show	6	21:10	90	1.4%	2.9%
AT STEINERS	Germany	Music	11	22:00	128	1.2%	4.1%
WILD LIVE	Germany	Documentary	34	20:15	45	1.1%	2.4%
WILD LIVE	Germany	Documentary	45	21:10	45	1.0%	2.2%
MURDER, SHE WROTE	USA	Series-Crime	44	21:10	44	0.9%	2.1%
MURDER, SHE WROTE	USA	Series-Crime	50	20:15	44	0.9%	1.9%
ARIELLE	USA	Childrens Prog.	100	18:50	22	0.8%	2.2%
APRIL, APRIL	Germany	Comedy Show	15	21:10	45	0.8%	1.5%
DR. QUINN, THE MEDI. WOMAN	USA	Series-Family	50	21:30	44	0.7%	1.7%

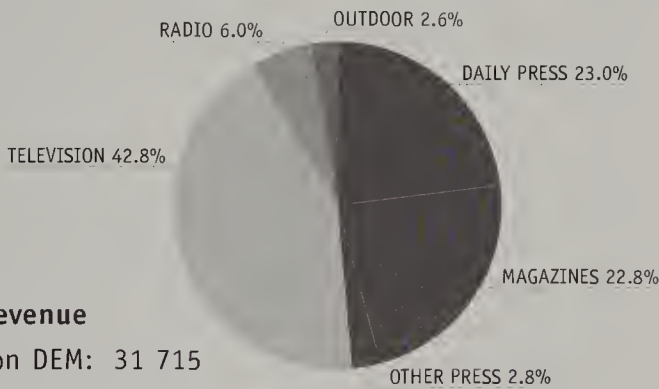
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
HOCHZEITSNACHT IM PARADIES	n.a.	Movie	17/01	22:05	100	2.5%	8.4%
THE MAN FROM LARAMIE	USA	Movie	10/11	20:15	98	2.4%	5.3%
WEIHNACHTEN IN DEN BERGEN	n.a.	Movie	18/12	22:05	109	2.2%	5.6%
SANTA CLAUS	USA	Movie	15/12	20:15	88	1.8%	4.0%
DER GEZAEHMTE WIDERSPENSTIGE	n.a.	Movie	10/04	20:15	100	1.8%	4.2%
DER SCHOENSTE TAG MEINES LEBENS	n.a.	n.a.	13/05	22:10	89	1.8%	6.3%
DER VOGELHAENDLER	n.a.	Movie	31/01	22:05	87	1.8%	5.4%
WIENER MAEDELN	n.a.	Movie	06/06	22:05	98	1.7%	6.5%
DIE FRISEUSE & DER MILLIONAER	n.a.	Movie	12/10	20:15	93	1.6%	3.7%
ISOLA BELLA	n.a.	Movie	24/01	22:05	89	1.6%	5.2%

Sources: AGF/GfK Fernsehforschung, 1999. IP Deutschland

Advertising Expenditure

ADVERTISING FIGURES		GROSS	NET
Total adspend	(in million DEM)	31.715	29.900
Total adspend	(in million USD)	16.403	15.465
Total adspend	(in million EUR)	16.215	15.288
TV adspend	(in million DEM)	13.578	8.444
TV adspend	(in million USD)	7.022	4.367
TV adspend	(in million EUR)	6.942	4.317
TV adspend	in % of GDP	0.35	0.22
TV adspend	per capita (USD)	85.6	53.3

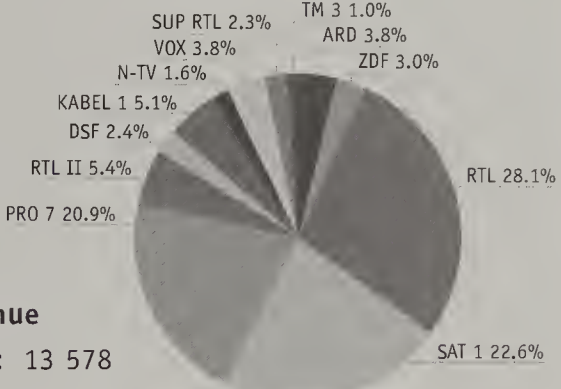
SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue
in million DEM: 31 715
in million EUR: 16 215

TV ADVERTISING STATISTICS	
Total number of spots broadcast	2 354 295
Average spot length (in sec.)	20
Total number of advertisers	n.a.
Number of TV advertisers	1 566
Total number of advertised products	52 629
Number products advertised on TV	3 964

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



Total TV Revenue
in million DEM: 13 578
in million EUR: 6 942

Sources: A.C. Nielsen S+ P, ZAW – Jahrbuch: Werbung in Deutschland 2000

TOP 10 ADVERTISING FIGURES GROSS				
TV Advertising Sectors	4 Media*	Television	Spent in TV	Share of TV Expenditure
FOOD	3 281	2 821	86.0%	20.7%
PERSONAL CARE	2 152	1 522	70.7%	11.2%
BEVERAGES	1 980	1 324	66.9%	9.7%
TRANSPORT	3 808	1 280	33.6%	9.4%
OFFICE EQUIPMENT	3 199	1 152	36.0%	8.5%
FINANCE	2 266	808	35.7%	5.9%
DETERGENTS	811	741	91.4%	5.5%
PHARMACY	1 028	594	57.8%	4.4%
EDUCATION/MEDIA	3 244	533	16.4%	3.9%
TRADE/MAILING	2 690	512	19.0%	3.8%
OTHER	7 256	2 291	31.6%	16.8%
TV Advertisers				
PROCTER & GAMBLE	651	589	90.5%	4.8%
FERRERO	441	406	92.1%	3.3%
EFFEM	312	302	96.8%	2.4%
TELEKOM	533	253	47.5%	2.0%
HENKEL	261	239	91.6%	1.9%
HAARKOSMETIK+PARFÜMERIE	302	236	78.2%	1.9%
KRAFT JACOBS SUCHARD	264	227	86.0%	1.8%
MARS	204	200	98.0%	1.6%
MAGGI	209	198	94.7%	1.6%
BEIERSDORF AG	267	182	68.2%	1.5%
OTHER	28 271	10.746	38.0%	79.1%
Total (in million DEM)	31 715	13 578	42.8%	100.0%
Total (in million EUR)	16 215	6 942	42.8%	100.0%

Source: A.C. Nielsen S+P

*Press, TV, radio and outdoor

Greece

The 1998–99 television season in Greece had three new characteristics worthy of note: firstly, the significant increase in the broadcasting of Greek series during prime time. This was very significant for audiences figures and ratings. The second characteristic of the last year in Greek television was the great appeal of Latin American telenovelas (mostly Mexican in origin), which were dubbed into Greek. Thirdly, but just as important for viewing figures, from early 1999, a variety of important events were covered on television, such as the Ocalan arrest and the war in Kosovo.

The aforementioned events led, naturally to a positive change in the television audience ratings. There was a notable increase in the overall total viewing and although the position of the stations did not change, small changes in audience share took place, as did the audience composition of some stations. Since February there has also been an increase in the interest for information programmes.

Antenna 1 remained in the first position of the Tops, with a small increase in share (24% for the period September 1, 1998 to August 31, 1999 compared to 23% for the previous season). The station had significant success in its prime time, both with sitcoms (e.g. “Ke I Padremeni Ehoun Psyxi”) and in drama serials (e.g. “Agigma Psyxis”). At the same time, it maintained its successful programming during off-peak hours with programmes such as “Kalimera Ellada”, “Proinos Kafes”, “Kalimera Zoi” and “Lampsi”. Antenna broadcasts mainly local productions and only about 20% of its schedule is taken up with non-Greek productions.

Mega is Antenna’s main rival and had the same average share during the last year as the previous season (21%) and remained in second place. Football matches from the Champions League, which are the most important sports events on non-subscription TV, were very popular. This was also true for the sitcom „Dyo Xeni“ which continued from the previous season. Mega also broadcast a successful Greek soap opera, „Apagorevmeni Agapi“. Added to this, Mega has broadcasting deals with several large film production companies such as Buena Vista and Columbia TriStar which help to keep the figures for younger viewers high.

Sky and Star both enjoyed gaining audiences from Antenna and Mega as they began broadcasting on the Greek market. Sky’s share also increased this year in the second half of the season to 16% compared with 15% last year. This rise is due mostly to the success of the Mexican telenovelas, mainly “Esmeralda” and “Maria“, which were very successful among children and women in all target age groups. Star, however, experienced a slight decrease in the average share for the season (13% compared to 14% last year). Foreign films were an important component of its programming.

ET1 and NET, Greece’s two public television channels, achieved the same shares as last year (6% and 4% respec-

tively), with the exception of ET1 in August, which, due to sports events such as the IAAF Championships, saw an increase in viewing. The profile of NET is very well-defined, since most of its programming is related to news-based and information topics.

The cable sector in Greece is still minimal with the main concentration being in Athens. It is still hoped that further investment will appear and support plans to expand the existing cable networks and to set up new ones.

Satellite television as such is also not as developed as other sectors in Greece. This is due to the fact that viewers can receive several free terrestrial channels and can pick up a certain amount of international satellite channels by rooftop aerial and so see no need to purchase an extra receiver and dish for the purpose.

Subscription TV channels have a penetration of 11% of homes in urban areas, as opposed to 9% the previous year (AGB Hellas Establishment Survey 1998, 1999-1st wave). Filmnet, SuperSport and KTV, respectively film channel, sport channel and children’s channel, all belong to the giant Filmnet Greece which is available to 80% of the Greek population. In the 1998–99 season, SuperSport won the rights to broadcast the Greek First League football and basketball games (basketball was formerly shown on Antenna).

The age of digital television is due to dawn in Greece in the coming months. After much regulatory negotiation, Multichoice has finally been approved a DTH licence by the National Radio and Television Council. As Greece was one of the first countries in Europe to pass legislation for digital television, it would seem to be appropriate that Greek viewers may finally be able to see digital television for themselves.

Greece

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General Data

COUNTRY	
Land area (km²)	131 957
Total population	10 554 000
Number of households	3 780 000
Average household size	2.8
In % of households/population equipped	
Phone	63.0/ n.a.
Mobile telephone subscribers	n.a./29.0
PC's	n.a./ n.a.
Internet access	n.a./ 1.5
Internet users	n.a./n.a.

Source: NSSG

ECONOMICS	
GDP in billion DRS (at current prices)	35 943
GDP per capita in DRS (at current prices)	3 419 573
Inflation rate in 1999 (in %)	2.7
Value of DRS in Euro (EUR)*	1 EUR = 330.3 DRS
Value of DRS in US-Dollar (USD)*	1 USD = 328.8 DRS

Source: NSSG

*December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	3 738 000
In % of all households	99.0
Numbers of channels received by 70% of the population	>10
TV License-Fee cost per year	none

Source: AGB 1999 establishment survey

TV EQUIPMENT	
	in % of TVHH
Colour TV	98.6
Multiset (homes with more than 1 TV set)	55.5
VCR	55.3
Teletext	n.a.
Remote control	97.1

Source: AGB 1999 establishment survey

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	0.1
Satellite	private dish/DTH	5.3
	collective dish/SMATV*	*
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

*included in DTH

TV SUBSCRIPTION			
Analog pay TV subscribers	310 000	Digital TV subscribers	n.a.

Source: TV International 2000

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
ET 1	1967	T	100%	Greek	126	Generalist	L-F, Adv.	ET 1
NET	1968	T	99%	Greek	126	Generalist	L-F, Adv.	ET 1
ET 3	1989	T	77%	Greek	70	Generalist	L-F, Adv.	ET 1

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
MEGA	1989	T	100%	Greek	168	Generalist	Adv.	In-house
ANTENNA TV	1989	T	100%	Greek	168	Generalist	Adv.	In-house
STAR	1993	T	94%	Greek	150	Generalist	Adv.	In-house
ALPHA*	1993	T	87%	Greek	140	Generalist	Adv.	In-house
NEW CHANNEL	1990	T	80%	Greek	133	Generalist	Adv.	In-house

Source: MEGA CHANNEL

* former SKAI

INTERNATIONAL/PAN EUROPEAN CHANNELS							
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue	
CNN INT.	Private	T, S	90%	English	News	Adv.	
MTV EUROPE	Private	T, S	48%	English	Music	Adv.	
EURONEWS	Private	T, S	42%	English	News	Adv.	
TV 5 EUROPE	Public	T, S	5%	French	Generalist	L-F, Spon.	
TVE INT.	Public	T, S	n.a.	Spanish	Generalist	L-F, Adv.	

Source: MEGA CHANNEL

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
RAI UNO	Public	T, S	n.a.	Italian	Generalist	L-F, Adv.

PAY TV (ANALOG)							
Channels	Launch	Diffusion	Subscribers	Language	h/week	Programming	Revenue
FILMNET	1994	T	310 000	Greek	168	Movies	Adv., Sub.
SUPERSPORT	1996	T	n.a.	Greek	n.a.	Sport	Adv., Sub.
K-TV	1996	T	n.a.	Greek	42	Children	Adv., Sub.

Source: Filmnet, TV International 2000

DIGITAL PACKAGES								
Channels	Launch	Diffusion	Decoder	Subscr.	Language	No. of ch.	Revenue	Cost/month
NOVA	1998	S	n.a.	*	Greek/English	20	n.a.	n.a.

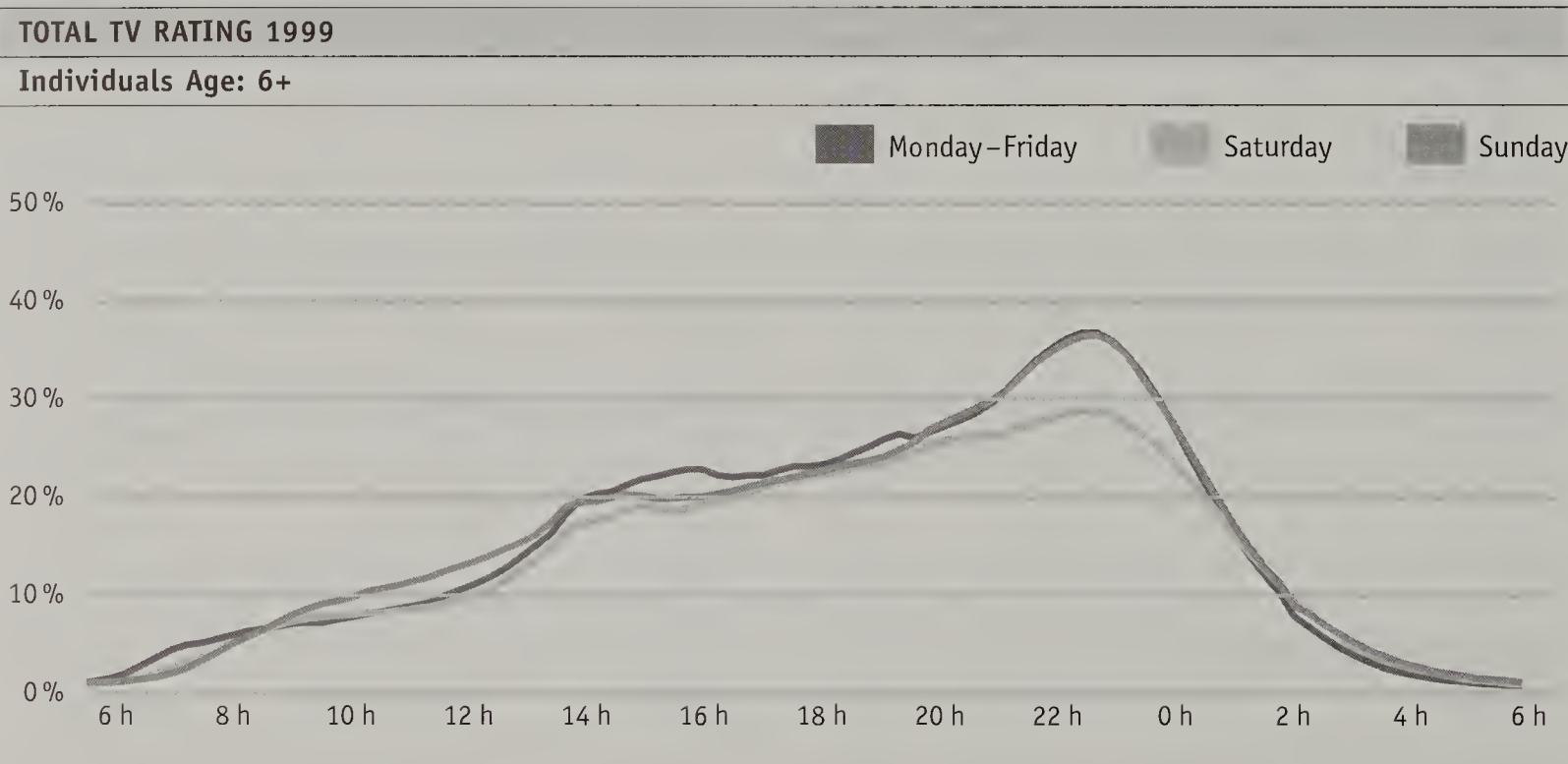
Source: TV Internaional 2000

* in test

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	AGB HELLAS
Panel/Sampling Size	800 households
Instrument used (people-meter, telefon, face-to-face)	People-meter
Population size in 000	
Individuals 6+	6 046
Housewives 25–54	599
Young Adults 15–34	2 295
Children 6–14	502

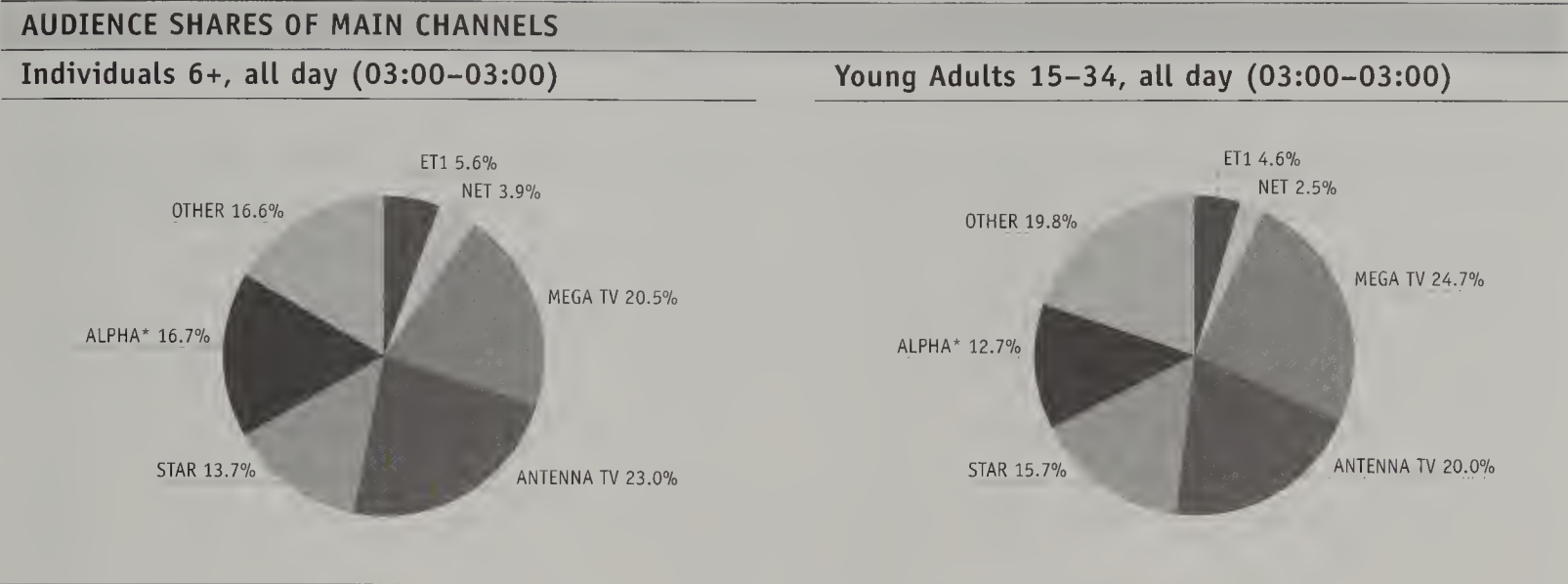
Source: EURODATA TV/AGB HELLAS



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Individuals 6+			Children 6–14			Young Adults 15–34			Housewives 25–54		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	71.1	71.7	73.1	n.a.	66	65	67.2	68.0	68.8	78.1	77.2	79.8
Viewing time per Viewer	297	304	309	n.a.	230	233	271	274	275	353	344	362
Viewing time per Individual	212	219	227	150	151	150	183	187	190	278	269	292

Source: EURODATA TV /AGB HELLAS

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 03:00 – 03:00								
	Individuals 6+		Young Adults 15–34		Children 6–14		Housewives 25–54	
	1998	1999	1998	1999	1998	1999	1998	1999
ET 1	6.4%	5.6%	5.4%	4.6%	n.a.	5.0%	5.3%	4.4%
NET	3.6%	3.9%	2.5%	2.5%	n.a.	1.4%	2.5%	2.7%
MEGA TV	20,9%	20,5%	24.6%	24.7%	n.a.	20,3%	20,3%	20,9%
ANTENNA TV	23.8%	23.0%	20,8%	20,0%	n.a.	20,3%	24.9%	24.5%
STAR	13.7%	13.7%	15.7%	15.7%	n.a.	13.2%	15.4%	14.4%
ALPHA*	14.5%	16.7%	10.4%	12.7%	n.a.	19.2%	16.4%	19.7%
OTHERS	17.1%	16.6%	20.6%	19.8%	n.a.	10.3%	15.2%	13.4%

*former: SKAI

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Individuals 6+		Young Adults 15–34		Children 6–14		Housewives 25–54	
	Day Time Prime Time		Day Time Prime Time		Day Time Prime Time		Day Time Prime Time	
	8–20 h	20–23 h	8–20 h	20–23 h	8–20 h	20–23 h	8–20 h	20–23 h
ET 1	5.6%	5.4%	4.4%	5.2%	5.4%	4.6%	4.6%	4.2%
NET	4.1%	3.4%	2.6%	2.2%	1.4%	1.4%	2.9%	2.2%
MEGA TV	18.6%	24.2%	23.5%	27.7%	18.9%	23.5%	18.4%	25.5%
ANTENNA TV	23.7%	24.6%	19.5%	22.1%	17.6%	24.5%	25.0%	26.2%
STAR	13.4%	13.1%	15.1%	15.7%	11.7%	14.3%	14.4%	13.1%
ALPHA*	17.4%	16.7%	13.6%	12.7%	22.0%	15.7%	21.0%	18.5%
OTHERS	17.2%	12.6%	21.3%	14.4%	11.3%	8.2%	13.7%	10.3%

Source: EURODATA TV/AGB HELLAS

*former: SKAI

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
FBAL CL OLYMPIAKOS-JUVENTUS	Greece	MEGA	Sport	21:36	17/03	26.8%	56.7%
KAI OI PANTREMENOI EHOYN PSYHI		ANT	Series	22:10	02/02	24.9%	53.9%
FBAL JUVENTUS-OLYMPIAKOS	Greece	MEGA	Sport	21:35	03/03	23.2%	50.9%
DYO XENI		MEGA	Series	21:25	01/02	22.9%	47.7%
AGGIGMA PYHIS	Greece	ANT	Series	22:10	22/02	22.5%	46.7%
FBAL PANATHINAIKOS-OLYMPIAKOS	Greece	ET 1	Sport	20:43	05/05	18.6%	46.4%
FBAL MUNICH-MANCHESTER		MEGA	Sport	22:45	26/05	18.6%	45.7%
EPITYMIES	Greece	ANT	Series	22:26	01/04	18.5%	42.5%
FBAL OLYMPIAKOS-REAL MADRID	Greece	MEGA	Sport	21:35	15/09	19.5%	52.0%
FBAL PORTO-OLYMPIAKOS		MEGA	Sport	21:34	21/09	18.1%	45.6%
FBAL OLYMPIAKOS-MOLDE	Greece	MEGA	Sport	21:37	28/09	17.5%	43.9%
EGKLIMATA		ANT	Series	21:15	02/02	17.2%	39.9%
I ZOI POY DEN EZISA	Greece	MEGA	Series	22:40	08/03	17.2%	37.6%
O TRELOS TAHI TETRAKOSIA	Greece	ANT	Movie	21:19	10/03	17.0%	40.4%
FBAL MOLDE-OLYMPIAKOS	Greece	MEGA	Sport	21:37	20/10	16.8%	39.1%
KONSTANTINOY KAI ELENIS		ANT	Series	21:12	22/02	16.8%	36.4%
TRUE LIES	USA	STAR	Movie	21:09	21/03	16.6%	38.3%
ZOYGKLA	Greece	SKY	News	23:04	09/12	16.5%	55.4%
NTANTA GIA OLES TIS DOYLEIES	Greece	ANT	Series	21:13	04/03	16.4%	37.8%
MPAM MPAMPAS KAI MPEMPA	Greece	ANT	Series	21:18	17/03	16.0%	35.6%

Sources: EURODATA TV/AGB HELLAS

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
O TRELOS TAHI TETRAKOSIA	Greece	ANT	21:19	10/03	17.0%	40.4%
TRUES LIES	USA	STAR	21:09	21/03	16.6%	38.3%
VIVA RENA	Greece	MEGA	21:19	09/01	14.1%	40.1%
HTIPOKARDIA STO THRANIO	Greece	MEGA	21:23	06/02	13.7%	38.0%
THE ROCK	USA	MEGA	21:04	10/10	13.4%	35.5%
DIPLOPENIES	Greece	MEGA	21:31	27/03	13.3%	34.2%
CUTTHROAT ISLAND	USA	STAR	21:17	07/02	13.3%	29.4%
I NERAIDA KAI TO PALIKARI	Greece	ANT	21:08	20/11	13.2%	39.3%
JUNIOR	USA	STAR	21:19	28/03	13.2%	30.1%
IT TAKES TWO	USA	STAR	21:10	14/03	13.1%	30.0%

Sources: EURODATA TV/AGB HELLAS

TOP 10 SPORT EVENTS						
Title		Channel	Start. Time	Date	Audience	Share
FBAL CL OLYMPIAKOS-JUVENTUS		MEGA	21:36	17/03	26.8%	56.7%
FBAL CL JUVENTUS-OLYMPIAKOS		MEGA	21:35	03/03	22.8%	49.5%
FBAL CL PANATHINAIKOS-OLYMPIAKOS		ET 1	20:43	05/05	18.6%	46.4%
FBAL CL FINAL MUNICH-MANCHESTER		MEGA	21:32	26/05	18.6%	45.7%
FBAL CL OLYMPIAKOS-REAL MADRID		MEGA	21:35	15/06	18.1%	48.3%
FBAL CL PORTO-OLYMPIAKOS		MEGA	21:34	21/09	18.1%	45.6%
FBAL CL OLYMPIAKOS-MOLDE		MEGA	21:37	28/09	17.5%	43.9%
FBAL CL MOLDE-OLYMPIAKOS		MEGA	21:37	20/10	16.8%	39.1%
FBAL CL JUVENTUS-MANCHESTER UNITED		MEGA	21:38	21/04	16.0%	37.0%
FBAL CL OLYMPIAKOS-PORTO		MEGA	21:36	03/11	15.6%	38.6%

Sources: EURODATA TV/AGB HELLAS

Top Programmes Channel by Channel

ET 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
WORLD TOURNAMENT ARSIS BARON	Greece	Sport	15	18:19	91	5.0%	15.7%
ATLITIKI EKPOMPI: KONTA STOYS DYN.		Sportnews	8	21:32	16	3.6%	9.3%
WORLD TOURNAMENT STIBOY		Sport	15	17:44	192	3.4%	17.7%
EUR. TOURN. ARSI BARON: ANDRON		Sport	5	19:43	89	3.0%	10.0%
ANISHYRA PSEVDI		Series	11	22:01	52	2.9%	7.1%
THOU VOU FALAKROS PRAKTOR		Movie	5	21:01	35	2.8%	7.5%
AKOLOYTHIA AKATHISTOY YMNOY		Mass	5	18:55	120	2.6%	8.5%
TO MIKRO SPITI STO PAGKRATI		Series	10	21:09	35	2.6%	6.8%
THE FINAL COUNTDOWN		Movie	5	23:49	41	2.5%	9.3%
FORMULA-1	USA	Sport	23	15:25	93	2.4%	13.8%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL PANATHINAIKOS-OLYMPIAKOS	Sport	05/05	20:43	125	18.6%	46.6%
BBAL OLYMPIAKOS-ZALGKIRIS KAOYNAS	Sport	20/04	21:49	95	12.1%	25.8%
FBAL GREECE-LATVIA	Sport	09/06	20:51	112	11.4%	36.1%
FBAL LA KOROYNIA-PAO	Sport	25/11	21:55	108	10.9%	27.2%
BBAL GREECE-CZECH REP	Sport	22/06	21:38	99	10.3%	28.2%
BBAL GERMANY-GREECE	Sport	21/06	22:31	85	9.7%	26.7%
BBAL GREECE-LITHUANIA	Sport	23/06	21:34	83	8.5%	26.0%
FBAL GREECE-ALBANIA	Sport	06/10	20:53	112	8.5%	25.7%
FBAL GREECE-NORWAY	Sport	27/03	17:48	117	7.6%	23.1%
FBAL GKRA TSER AK-PAO	Sport	21/10	21:27	107	7.6%	18.4%

Source: EURODATA TV/AGB HELLAS

MEGA							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
I ZOI POY DEN EZISA	Greece	Series	9	22:37	54	12.5%	28.0%
TO SIMADI TOY EROTA	Greece	Series	25	22:15	48	11.9%	31.3%
DYO XENOI	Greece	Series	84	21:59	58	10.1%	31.2%
I ZOI MAS, MIA BOLTA	Greece	Series	11	22:45	47	9.7%	25.4%
KATI TREHEI ME TOYS DIPLA	Greece	Series	20	21:38	36	9.5%	24.8%
OI ANTRES DEN YPARHOYN PIA	Greece	Series	23	21:27	39	9.1%	24.0%
STA GIPEDA TIS EYROPIS	Greece	Sport	5	21:17	17	9.0%	24.0%
MPRABO: EKANES TIN TYHI SOY		Entertainment	26	21:28	129	8.7%	25.4%
I AITHOUSA TOY TROMOU		Series	16	22:13	50	8.6%	19.4%
I BENTETTA		Series	12	22:46	47	8.0%	23.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CL OLYMPIAKOS-JUVENTUS		Sport	17/03	21:36	114	26.8%	56.7%
FBAL JUVENTUS-OLYMPIAKOS		Sport	03/03	21:35	113	22.8%	49.5%
FBAL MUNICH-MANCHESTER U.		Sport	26/05	21:32	121	18.6%	45.7%
FBAL OLYMPIAKOS-REAL MADRID		Sport	15/09	21:35	111	18.1%	48.3%
FBAL PORTO-OLYMPIAKOS		Sport	21/09	21:34	114	18.1%	45.6%
FBAL OLYMPIAKOS-MOLDE		Sport	28/09	21:37	108	17.5%	43.9%
FBAL MOLDE-OLYMPIAKOS		Sport	20/10	21:37	105	16.8%	39.1%
FBAL JUVENTUS-MANCHESTER U.		Sport	21/04	21:38	100	16.0%	37.0%
FBAL OLYMPIAKOS-PORTO		Sport	03/11	21:36	109	15.6%	38.6%
FBAL REAL MADRID-OLYMPIAKOS		Sport	26/10	21:38	111	15.5%	43.0%

Sources: EURODATA TV/AGB HELLAS

ANTENNA							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
AGGIGMA PYHIS	Greece	Series	24	22:24	54	17.1%	38.0%
EPITYMIES	Greece	Series	34	21:59	53	15.7%	38.3%
EGKLIMATA	Greece	Series	32	21:11	44	13.2%	35.1%
A.M.A.N.	Greece	Light Entertainm.	23	23:03	53	12.9%	35.0%
KONSTANTINOY KAI ELENIS	Greece	Series	39	21:16	48	12.3%	32.5%
TRIKYMIA	Greece	Series	21	22:27	49	12.3%	32.0%
KAI OI PANTREMENOI EHOYN PYHI	Greece	Series	96	22:08	46	10.8%	31.6%
SYNORA AGAPIS	Greece	Series	15	22:39	48	10.4%	27.2%
TANGKO GIA TREIS	Greece	Series	13	21:08	33	9.8%	26.7%
ADELFE PYHES	Greece	Series	12	21:12	31	8.9%	24.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
O TRELLOS TA'HEI 400	Greece	Movie	10/03	21:19	90	17.0%	40.4%
MISS GREECE 99	Greece	Variety Show	31/03	21:27	172	14.1%	36.0%
I NERAIDA KAI TO PALLIKARI	Greece	Movie	20/11	21:08	105	13.2%	39.3%
THE MASK	USA	Movie	14/04	22:27	94	12.9%	34.3%
MOYSIKA BRABEIA:POP KORN 98	Greece	Light Entertainm.	08/03	21:13	192	12.6%	31.3%
ALIVE	USA	Movie	28/04	22:24	116	12.1%	33.3%
I HARTOPIAIHTRA	Greece	Movie	28/12	22:23	98	11.9%	33.5%
KRISMI APOFASI	Greece	Movie	10/11	21:22	127	11.8%	30.3%
ENAS DON ZOYAN GIA KLAMMATA	Greece	Movie	03/02	21:17	82	11.7%	27.0%
I AGAPI MAS	Greece	Movie	03/03	21:09	97	11.4%	25.0%

Sources: EURODATA TV/AGB HELLAS

STAR							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NIKITA	USA	Series	10	22:29	45	5.8%	12.7%
LUZ MARIA	Spa./Peru	Series	75	14:16	66	5.4%	25.0%
EKTOS KOINONIAS	Greece	News	7	23:08	39	5.3%	15.5%
REPORTAZ STIN OMIHLI	Greece	News	12	23:16	79	5.1%	19.7%
X-FILES	USA	Series	10	21:28	46	5.1%	11.5%
OI DIAPLEKOMENOI	Greece	Entertainment	37	21:18	56	5.2%	15.4%
TA MYSTIKA TIS AGAPIS	Greece	News	206	14:53	54	4.2%	18.6%
TITLOI EIDISEON	Greece	News	15	23:16	6	4.0%	12.2%
ADVENTURES/FAMILY ROBINSON	USA	Series	10	14:06	78	3.8%	17.9%
NYHTERINES EIDISEIS STAR	Greece	News	363	24:00	11	3.8%	14.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
TRUE LIES	USA	Movie	21/03	21:09	136	16.6%	38.3%
CUTTHROAT ISLAND	USA	Movie	07/02	21:17	116	13.3%	29.4%
JUNIOR	USA	Movie	28/03	21:19	104	13.2%	30.1%
IT TAKES TWO	USA	Movie	14/03	21:10	97	13.1%	30.0%
WATERWORLD	USA	Movie	14/11	21:02	128	12.5%	30.4%
MRS DOUBTFIRE	USA	Movie	28/11	21:01	118	12.2%	29.5%
SPEED	USA	Movie	31/10	21:02	110	11.9%	29.0%
KAI O SIMITIS TELEI TON GERM. TOY	Greece	Theater	27/10	21:06	157	11.8%	33.6%
TURBULENCE	USA	Movie	07/03	21:12	96	11.8%	26.8%
HOME ALONE	USA	Movie	19/12	21:01	99	11.5%	28.3%

Sources: EURODATA TV/AGB HELLAS

SKY							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MARIA	Mexico	Series-Daily Soap	229	15:51	39	7.0%	31.0%
O IOYDAS FILOYSE YPEROHA	Greece	Series	14	21:50	44	7.0%	17.8%
ROZALINTA	Mexico	Series-Daily Soap	5	21:11	49	6.7%	18.2%
BRADYNES EIDISEIS SKY	Greece	News	360	19:47	90	6.5%	23.2%
EKTAKTES EIDISEIS SKY	Greece	News	6	17:01	24	6.1%	26.0%
LA URSURPADORA	Mexico	Series-Daily Soap	198	16:54	44	5.9%	26.7%
ZOYGKLA	Greece	News	40	23:20	129	5.9%	24.5%
VERONICA	MEXICO	Series-Daily Soap	76	15/22	48	5.8%	25.7%
MISTER BEAN	UK	Series-Comedy	33	22:29	32	5.7%	14.5%
KITRINOS TYPOS	Greece	News	82	23:20	159	5.5%	27.9%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
BBAL TEAM SYSTEM MPOLONIA-PAO		Sport	04/03	20:59	73	11.5%	25.9%
THE SPECIALIST	USA	Movie	18/05	21:47	107	9.7%	24.1%
FBAL INTER-ROMA		Sport	12/09	21:26	103	9.0%	26.1%
I SOFERINA	Greece	Movie	13/10	21:47	101	9.0%	23.6%
EKTAKTI EPIKAIROTITA:E'E'ERHETAI!	Greece	News	19/11	17:59	257	8.9%	25.5%
ON DEADLY GROUND	USA	Movie	16/02	21:52	99	8.4%	18.3%
O TSARLATANOS	Greece	Movie	26/12	21:11	88	8.1%	23.1%
FBAL INTER-MILAN		Sport	23/10	21:25	114	8.1%	22.8%
I DE GYNI NA FOBITAI TON ANDRA	Greece	Movie	19/10	21:39	105	8.1%	20.5%
KOSMOS KAI KOSMAKIS	Greece	Movie	03/01	21:30	105	8.1%	19.2%

Sources: EURODATA TV/AGB HELLAS

NET							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
OI ENTIMOTATOI FILOI MOY	Greece	News	25	15:24	98	1.9%	8.6%
NEA TON 9	Greece	News	347	20:59	64	1.8%	4.8%
MESIMERIANES EIDISEIS NET	Greece	News	354	15:00	50	1.7%	7.5%
NTOKYMANTER: TO ANTROPINO FYLO		Documentary	6	22:14	54	1.5%	4.6%
TO NTERMPI TIS DEYTERAS		Sport	8	22:11	115	1.5%	4.2%
TELIKI EYTEIA	Greece	News	17	23:12	59	1.5%	4.1%
AMFITEATRO	Greece	News	13	22:30	97	1.4%	4.1%
DIA TAYTA	Greece	News	27	22:13	59	1.4%	3.5%
APOGEYMATINES EIDISEIS NET	Greece	News	360	17:59	16	1.3%	5.7%
KOSMOS		Documentary	5	18:20	43	1.3%	4.5%

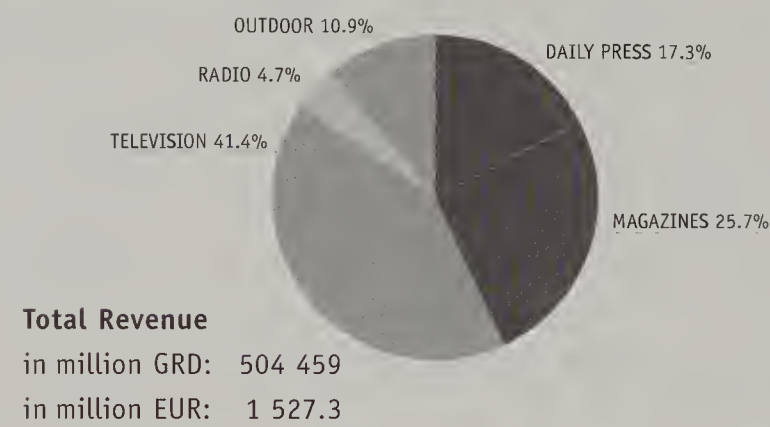
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GKARSONIERA GIA DEKA	Greece	Movie	18/04	13:06	112	3.0%	15.9%
EXODOS KINDYNOY	Greece	Movie	25/04	12:58	127	2.9%	13.2%
NORTH BY NORTHWEST	USA	Movie	27/11	22:04	134	2.9%	9.8%
O METYSTAKAS TOY LIMANIOY	Greece	Movie	28/03	13:38	82	2.8%	12.8%
I MODISTROYLA	Greece	Movie	07/11	15:21	74	2.8%	12.2%
POTE TIN KYRIAKI	Greece	Movie	06/03	22:33	91	2.7%	8.4%
EKTAKTI EPIKAIR.:ETNIKI APOLEIA	Greece	News	17/09	12:48	180	2.6%	12.1%
TI KANEI O ANTROPOS GIA NA ZISEI	Greece	Movie	21/03	13:22	89	2.6%	11.6%
RIO BRAVO	USA	Movie	06/02	15:20	136	2.5%	9.6%
I ADERFI MOY TELEI XYLO	Greece	Movie	31/01	13:32	75	2.5%	9.5%

Sources: EURODATA TV/AGB HELLAS

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million GRD)	504 459
Total adspend	(in million USD)	1 534.2
Total adspend	(in million EUR)	1 527.3
TV adspend	(in million GRD)	208 906
TV adspend	(in million USD)	635.4
TV adspend	(in million EUR)	632.5
TV adspend	in % of GDP	0.58
TV adspend	per capita (USD)	60.2

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

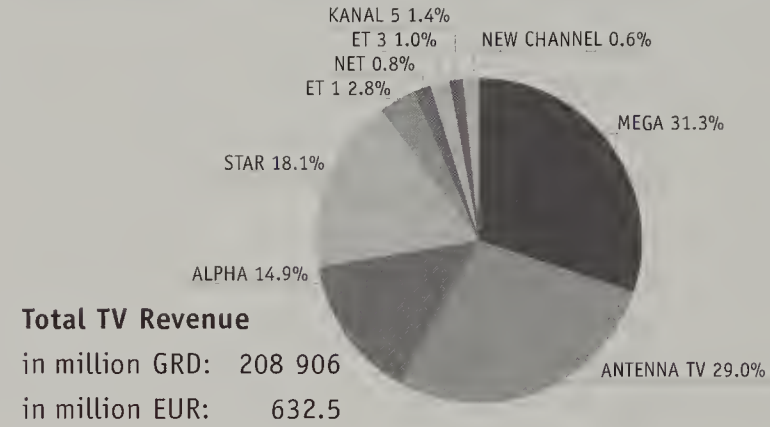


Source: MEDIA SERVICES S.A, MEGA CHANNEL

TV ADVERTISING STATISTICS	
Total number of spots broadcast	988 445
Average spot length (in sec.)	19.8
Total number of advertisers	n.a.
Number of TV advertisers	n.a.
Total number of advertised products	9 582
Number products advertised on TV	3 184

Source: MEDIA SERVICES S.A, MEGA CHANNEL

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	3 Media*	Television	Spent in TV	Share of TV Expenditure
CARS	31 658	15 665	49.5	7.5
PUBLIC	24 958	15 176	60,8	7.3
MOBILE TELEPHONY	21 684	14 175	65.4	6.8
ALCOHOLIC BEVERAGES	16 109	12 803	79.5	6.1
DAIRY PRODUCTS	14 260	11 911	83.5	5.7
CONFECTIONARY	12 079	10.980	90,9	5.3
DETERGENTS	10 342	10.138	98.0	4.9
HAIR CARE	10 393	7.872	75.7	3.8
BANK	14 621	5 225	35.7	2.5
STORES	9 696	5 193	53.6	2.5
OTHERS	283 654	99 767	35.2	47.8
TV Advertisers				
JOKER(LOTTERY)	3 579	2 692	75.2	1.3
PASOK**	3.412	2 401	70,4	1.1
BE FREE\TELESTET	1 808	1 695	93.7	0,8
COCA-COLA	1 401	1 243	88.7	0,6
KOTSOVOLOS STORES	1 237	1 048	84.7	0,5
AMSTEL BEER	1 090	1 031	94.5	0,5
JOHNNIE WALKER	1 246	997	80,0	0,5
GREEK STATE BONDS	1 533	982	64.1	0,5
PANAFON	1 725	980	56.8	0,5
NEA DIMOKRATIA**	1 387	915	66.0	0,4
OTHERS	431 036	194 922	45.2	93.3
Total (in million GRD)	449 455	208 906	46.5%	100.0%
Total (in million EUR)	1 361	632.5	46.5%	100.0%

Source: MEDIA SERVICES S.A,UNIVERSAL MEDIA S.A

*TV, Press, Radio **Political Party

Iceland

With a population that does not exceed 280 000 people, the Icelandic television market is among the smallest in Europe. Nevertheless, Iceland currently has nine domestic terrestrial national, regional and local television channels. In addition, some 25 foreign national and pan-European satellite channels are redistributed via MMDS or cable in localities throughout the country.

Notwithstanding this ‘abundance’, the television market is highly concentrated as market share of viewers, revenue and ownership are concerned. Moreover, the Icelandic broadcasting market is probably among one of the most deregulated in Europe, with almost none restrictions on ownership and cross-media ownership, whatsoever, and little regulation on programming of private television.

Since private actors were allowed to enter broadcasting in the mid-1980s, ten private television stations have seen the light of the day. Two have since folded, and only few of those remaining have succeeded in making any substantial impact on the market. The most important are the national stations, Stöd 2 (Channel 2) and Syn (Vision TV). Both stations are owned by subsidiary companies of the multi-media company Nordurljos (Northern Lights Corporation – NLC). Receipts from subscriptions and advertising are the principal sources of income for the stations, and, to a lesser extent, sponsoring.

Channel 2 transmitted, on average, 109 hours a week of general programming in 1999, and Vision TV, whose programme schedule consists predominantly of sports and fiction, 64 hours. Less than 15% of Channel 2’s programming is domestically produced and for Vision TV this figure is less than 3%. Foreign programmes on both channels are mostly of Anglo-American origin. NLC also owns Biorasin (The Movie Channel), a 24-hour movie channel, with a technical transmission capacity to 60–70 percent of the population. All stations are pay-channels, transmitting in an encrypted format, except for the breakfast programme and the main daily news and current affairs magazine on Channel 2.

By the end of last year, NLC acquired majority of shares in the 24-hour music channel Pop-TV, a free television channel, which is only receivable in the capital region. NLC also offers a package of 15 overseas channels, exclusively English language ones, via subscription through its relay service Fjölvar. This is sold to subscribers either directly or as part of a package to the other channels.

The other key player in the Icelandic television market is the state owned public service broadcaster, Ríkisutvarpid (the Icelandic National Broadcasting Service – RUV). Originally starting TV transmissions in 1966, when television was introduced in the country, RUV operates one TV channel (RUV-TV). The station, which has a universal penetration, is financed by licence fee, advertising and sponsoring. RUV-TV transmitted 65 hours a week on average in 1999. About 30% of programming is domestically produced. Recently, the administrators of RUV have

expressed their interest in establishing a new channel, but a definite move in that direction has yet to be taken. One of the features of the television market is the long-lasting duopoly between the RUV-TV and Channel 2, irrespective of whether measured in terms of viewing or revenue. The two stations are sharing the market, more or less on equal terms. Notwithstanding a significant loss in terms of viewing, RUV-TV has managed to retain nearly a 50% market share, followed closely by Channel 2 with some 40–45% share.

Alongside these previously mentioned key players, there are also a number of small commercial, niche and local free television channels. All of them are free channels and draw their revenue from advertising and sponsoring. The position of most of these channels is insecure: they are financially weak and their market share of viewing is negligible. An exception to this is the Skjar 1 (Screen One). The channel, which is receivable in the capital region and its surroundings, broadcasts some ten hours a day, catering especially for adolescents and young people. The programme fare consists mainly of sitcoms, series, B movies and daily news and current affairs programme during mid-week. The station will be receivable throughout the country in autumn this year, as planned.

Responding to increasing competition, both RUV-TV and Channel 2 have reorganized their prime-time schedule recently in an effort to lengthen the peak hours.

During the legislative session 1999–2000, the Assembly ratified a new Broadcasting Act that provides a general legal framework for broadcasting. The immediate occasion for this revision of the Broadcasting Law is a new EU-directive, which, among other things, obliges the signatories of the EEA to make a list of important events, which must be televised in an open signal, irrespective of the exclusive rights that a television station may have acquired.

The owners of Channel 2 and a new company, Skjavarp, which runs a television transmitter chain throughout the country, have announced that both companies will possibly start experimental digital television transmissions in autumn this year.

Iceland

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General Data

COUNTRY	
Land area (km ²)	103 000
Total population	278 702
Number of households	98 000*
Average household size	2.8
In % of population equipped	
Phone	92.0**
Mobile telephone subscribers	40.0**
PC's	61.0**
Internet access	48.0
Internet users	68.9***

Source: Statistics Iceland

*Estimation, **in 1998, ***Base: 16–75; Gallup

ECONOMICS	
GDP in million ISK (at current prices)	637 600
GDP per capita in ISK (at current prices)	2 300 000
Inflation rate in 1999 (in %)	3.4
Value of ISK in Euro (EUR)	1 EUR = 72.84 ISK
Value of ISK in US-Dollar (USD)	1 USD = 72.55 ISK

Source: Statistics Iceland

TV OVERVIEW	
Total number of TV households (TVHH)	96 000
In % of all households	96.0
Numbers of channels received by 70% of the population	3
TV License-Fee cost per year	ISK 25 200.–/EUR 346.–

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.1
Multiset (homes with more than 1 TV set)	47.5
VCR	81.9
Teletext	67.4
Remote control	n.a.

Source: Statistics Iceland

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	30.0
	connected	n.a.
Satellite	private dish/DTH*	3.3
	collective dish/SMATV	n.a.
Terrestrial	analog	98.0
	digital	none
	MMDS	n.a.

*in 1998 – incl. SMATV

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	none

Source: Statistics Iceland

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
RUV-TV	1966	T, C	99%	Icelandic	65	Generalist	L–F, Adv.	In-house

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
AKSJON TV	1997	T	5–7%	Icelandic	25	Local affairs/Gen.	Adv.	In-house
HAFNARFJÖRDUR TV	1995	T, C	5–7%	Icelandic	3	Local affairs	Spon.	n.a.
OMEGA TV	1992	T, C	65%	Icelandic	168	Religious	Don., Adv.	In-house
POP-TV	1998	T, C	65%		168	Music	Adv.	In-house
SCREEN ONE	1998	T, C	65%	Icelandic	70	Generalist	Adv.	In-house

Source: Statistics Iceland

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ANIMAL PLANET	Private	T, C	60–70%	English	Documentary	n.a.
BBC PRIME	Public	T, C	60–70%	English	Entertainment	n.a.
BBC WORLD	Private	C	30%	English	News	n.a.
CARTOON NETW.	Private	T, C	60–70%	English	Cartoons	n.a.
CNBC EUROPE	Private	T, C	60–70%	English	News	n.a.
CNN INT.	Private	T, C	60–70%	English	News	n.a.
COMPUTER CH.	Private	C	30%	English	Computers	n.a.
DISCOVERY CH.	Private	T, C	60–70%	English	Documentary	n.a.
EUROSPORT	Private	T, C	60–70%	English	Sport	n.a.
FOX KIDS	Private	T	65%	English	Children	n.a.
HALLMARK	Private	T, C	60–70%	English	Movies	n.a.
MU TV	Private	T, C	60–70%	English	Sport	n.a.
MTV	Private	T, C	60–70%	English	Music	n.a.
NATIONAL GEOGRAPHIC	Pan-Euro	T, C	60–70%	English	Documentary	n.a.
SKY NEWS	Private	T, C	60–70%	English	News	n.a.
TCM	Private	T, C	60–70%	English	Old movies	n.a.
TVE	Public	C	30%	Spanish	Generalist	n.a.
TRAVEL TV	Private	C	30%	English	Travel	n.a.
TV5	Public	C	30%	French	Generalist	n.a.
VH-1	Private	T, C	60–70%	English	Music	n.a.

Source: Statistics Iceland

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ARD	Public	C	30%	German	Generalist	L–F, Adv.
PRO 7	Private	C	30%	German	Generalist	Adv.
RAI UNO	Public	C	30%	Italian	Generalist	L–F, Adv.
SVT 1	Public	C	30%	Swedish	Generalist	L–F, Spon.
SVT 2	Public	C	30%	Swedish	Generalist	L–F, Spon.

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
CHANNEL 2	1986	T**	54 000*	Icelandic	109	Generalist	2 746	Sub., Adv.	Icel.***
VISION TV	1995	T**	29 000*	Icelandic	64	Sports, Fiction	3 616	Sub., Adv.	Icel.***
MOVIE CHANNEL	1998	T (MMDS)	n.a.	Icelandic	168	Movies	3 885	Sub., Adv.	Icel.***

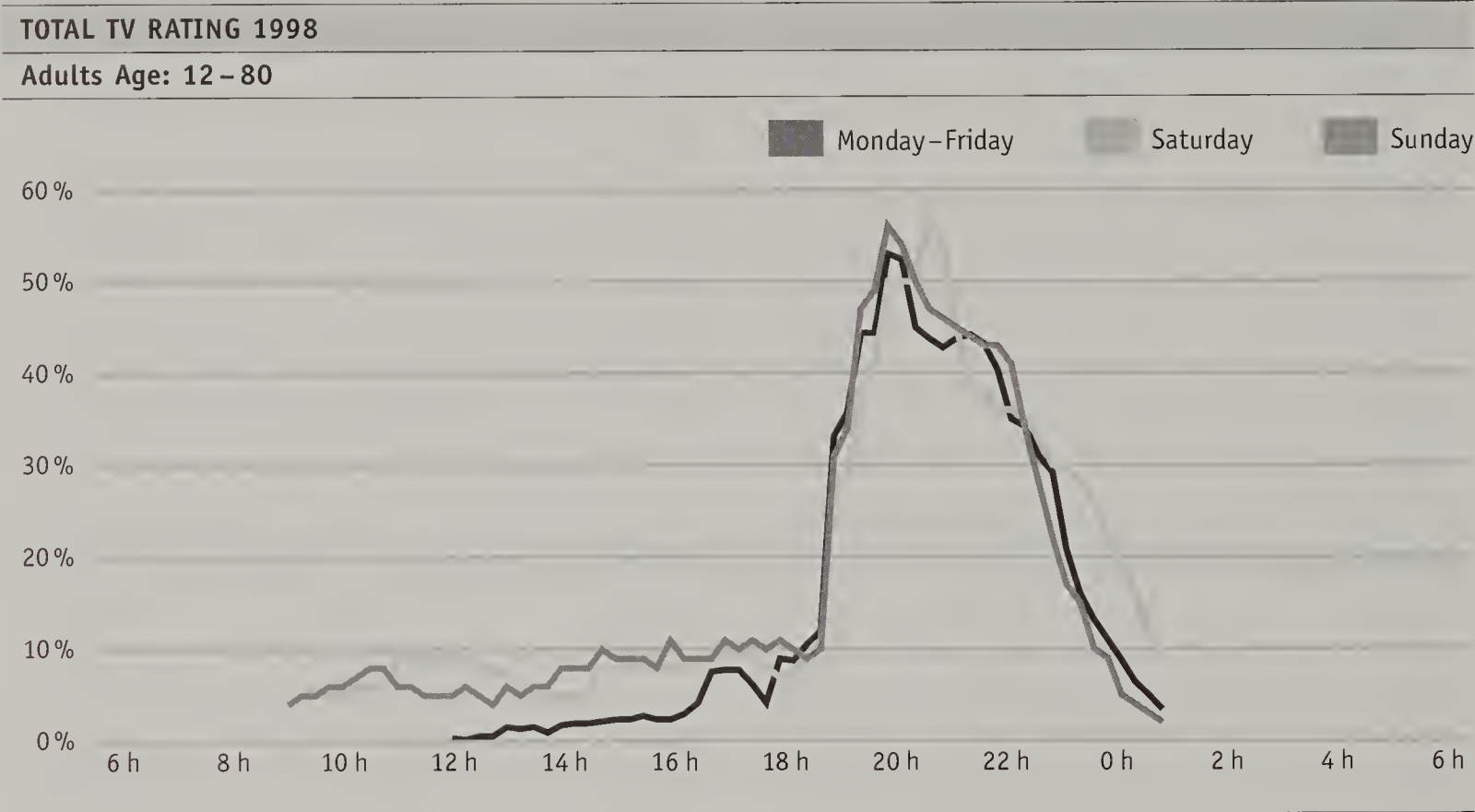
Source: Statistics Iceland

*Estimation; ** MMDS; ***Broadcasting Corp.

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	Gallup	
Panel/Sampling Size	1 500 households	
Instrument used (people-meter, telefon, face-to-face)	diary	
	Population size in 000	
Individuals 12–80	216	

Source: Statistic Iceland



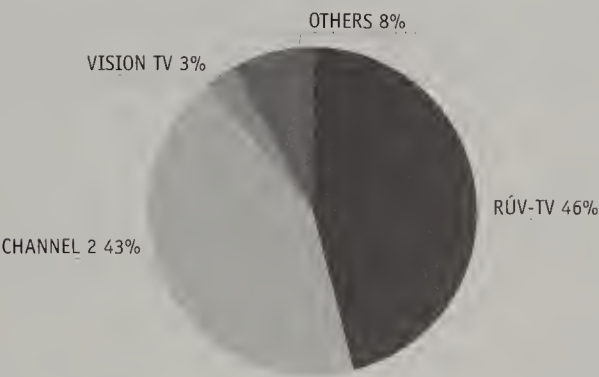
DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)			
Adults 12–80			
	1997	1998	1999
Daily reach in %	87	86	n.a.
Viewing time per Viewer	139	142	n.a.
Viewing time per Individual	131	134	n.a.

Source: Statistics Iceland (information based upon Social Science Research Institute at the University of Iceland (Media Surveys 1997 and 1998).

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS 1998

Adults 12 – 80, all day (09:00–03:00)



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 09:00 – 03:00

Adults 12–80 Years		
	1998	1999
RUV-TV	46.0%	n.a.
CHANNEL 2	43.0%	n.a.
VISION TV	3.0%	n.a.
OTHERS	8.0%	n.a.

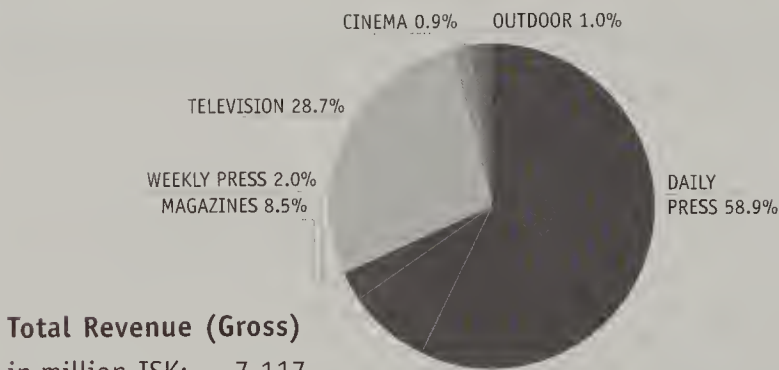
Source: Statistics Iceland (information based upon Social Science Research Institute at the University of Iceland (Media Surveys 1997 and 1998).

Advertising Expenditure

ADVERTISING FIGURES	GROSS*	NET**
Total adspend (in million ISK)	7 117	4 243
Total adspend (in million USD)	98.1	58
Total adspend (in million EUR)	97.7	58
TV adspend (in million ISK)	2 043	887
TV adspend (in million USD)	28	12
TV adspend (in million EUR)	28	12
TV adspend in % of GDP	0.32	0.15
TV adspend per capita (USD)	101	44

*Rate card data 1999, a sample of media, excl. Radio, Gallup Iceland
**Survey data 1998. Statistic Iceland

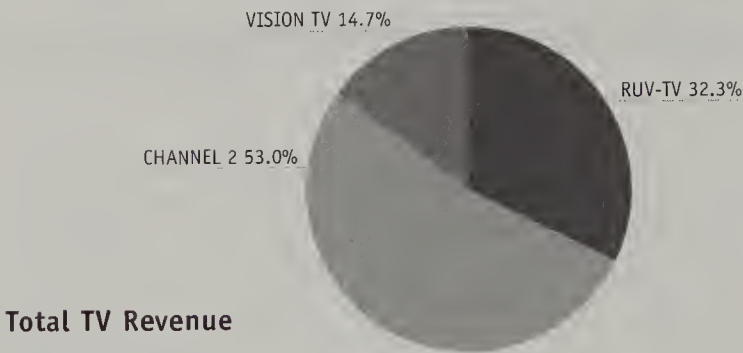
SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue (Gross)

in million ISK: 7 117
in million EUR: 97.7

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue

in million ISK: 2 043
in million EUR: 28

Source: Statistic Iceland

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	4 Media*	Television	Spent in TV	Share of TV Expenditure
NEW CARS	556	180	32.4%	8.8%
MASS MEDIA	298	116	38.9%	5.7%
VIDEOS: RENTAL AND SELL-THROUGH	145	106	73.1%	5.2%
SOFT DRINKS	124	107	86.3%	5.2%
CANNED/PROCESSED MEAT	91	80	87.9%	3.9%
GROCERY STORES/SUPERMARKETS	316	75	23.7%	3.7%
TELEPHONE SERVICE	139	57	41.0%	2.8%
SECURITIES SERVICES	183	58	31.7%	2.8%
CINEMAS	391	49	12.5%	2.4%
LOTTERIES	125	50	40.0%	2.4%
OTHERS	4 748	1 165	24.5%	57.0%
Total (in million ISK)	7 117	2 043	28.7%	100.0%
Total (in million EUR)	97.7	28	28.7%	100.0%

Source: Statistic Iceland (based upon Gallup Iceland)

*Press, TV, outdoor and cinema

Ireland

A framework for digital terrestrial broadcasting in Ireland was set out in the Broadcasting Bill of 1999. As already suggested in the last Keyfacts issue, the new company DIGICO is to build the whole DTT infrastructure and is to be the main operator. There are to be 6 multiplexes, each with 5 channels. These are to be divided as follows: one solely for RTE, one to be shared by TV3 and TG4 and the four remaining multiplexes for other commercial services such as the BBC and CH4 (UK terrestrial channels).

Plans from RTE for its multiplex include a round the clock news channel, a learning and parliamentary channel and a third channel aimed at young people. If new legislation is passed, RTE will have to sell off 60% of its present transmitter network and put the proceeds towards funding the digital channels for the first three years of broadcast.

The three “main” terrestrial channels in Ireland are RTE1, Network 2 and TV3 and between them they cover the entire range of target groups. TV3 is the newest of the channels and filled the important gap which had previously been missing, that of the 15-44 year old target group. RTE aims for a primarily older audience and Network 2 at children and young people. With such extremes, TV3 was provided with the perfect opportunity to be the middle man and has been consequently successful.

TV3 offers movies, miniseries, music and news programmes mainly aimed at 15–44 year olds, this applies to about 50% of the total population. The channel’s news programmes have proven successful as they provide more national/local news than the UK channels and in a less traditional style than RTE. TV3’s major shareholder is CanWest and through this, can acquire many Hollywood films relatively cheaply, The channel also won the rights to show the Champions’ League for the next three years (starting from September 1999). The rights were previously held by RTE.

To keep up with rival TV3, RTE has now begun broadcasting 24 hours a day and its own produced soap operas “Fair City” and “Glenroe” have proven to be real audience winners. Almost 60% of RTE’s total programming is of local production, something the broadcaster is naturally proud of.

In 1999, RTE and Telecom Eireann were pressured to sell their stakes in the cable operator Cablelink and these were won by NTL, a UK based company. Nearly half of all television households in Ireland have cable and in Dublin the figure is over 90%. There are now 3 main cable operators in Ireland: Cablelink, originally formed in the mid 1980’s, Princes Holdings and CMI (Cable Management Ireland). In autumn 1999, CMI was bought by Liberty Media and their combined networks will cover most of the country (with the exception of Cablelink’s strong franchise in Dublin).

Due to the availability of cable in Ireland, there had not been much call for DTH services. BskyB from the UK is for the moment the country’s only DTH service and still faces strong competition from the Irish cable operators. In January 1999, it launched Sky Digital.

Forecasts show that with the developments in digital television and internet, subscriptions to cable and MMDS should increase rapidly. With the era of pay-per-view also taken into account, revenues are expected to double over the next 10 years.

One problem which the Irish MMDS operators face is the number of illegal operators who are still in existence in the country. These illegal operators win subscribers from the legal companies by offering packages at a fraction of the normal cost. They deflect the signals from legal broadcasters and themselves have no licence and are not registered by any authority. This has become a political question and companies are now threatening that if nothing is done to ban these operators and provide compensation for the existing registered companies, they will sue the Irish government.

At the top of the list of top 10 advertising products in Ireland is the category of toiletries and cosmetics. The different companies which make up this category spent 77% of their advertising budget in television. Procter and Gamble are, of course, more than a little responsible for this situation taking up approx 5.3% of total television expenditure. As far as the share of advertising expenditure is concerned, it is still the written press that takes the lion’s share in Ireland, in 1999, the figure for the press stood at 52% of total expenditure. Television came second taking 30%.

Ireland

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General Data

COUNTRY	
Land area (km ²)	70 273
Total population	3 704 900
Number of households	1 235 000
Average household size	2.9
In % of households equipped	
Phone	81.0
Mobile telephone subscribers	38.0
PC's	20.0
Internet access	9.0
Internet users	13.5 ¹

Sources: Establishment Survey 1999/C.S.O. 1996

¹ Arnarch Consulting

ECONOMICS	
GDP in million IEP (at current prices)	59 637
GDP per capita in IEP (at current prices)	16 096
Inflation rate in 1999 (in %)	3.4
Value of IEP in Euro (EUR)*	1 EUR = 0.79 IEP
Value of IEP in US-Dollar (USD)*	1 USD = 0.78 IEP

Sources: Establishment Survey 1999/C.S.O. 1996

*December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	1 215 000
In % of all households	98.0
Numbers of channels received by 70% of the population	n.a.
TV License-Fee cost per year	IEP 70.–/EUR 89.–

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.0
Multiset (homes with more than 1 TV set)	34.0
VCR	76.0
Teletext	57.0
Remote control	90.0

Source: Establishment Survey 1999

¹ Statistical Yearbook 2000; European Audiovisual Observatory

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	49.7 ¹
	connected	42.0
Satellite	private dish/DTH	7.0
	collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	6.0

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
RTE 1	1960	T	100%	English	136	Generalist	L–F, Adv.	In-house
NETWORK 2	1978	T	100%	English	140	Young dults	L–F, Adv.	In-house
TG4*	1997	T	85%	Irish	144	Irish Language	L–F, Adv.	Post TV

Source: Cable Management Ireland

*former name: TNAG

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TV 3	1998	T	85%	English	156	Generalist	Adv.	In-house

Source: Cable Management Ireland

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
MTV	Private	C, S	30%	English	Music	Adv.
SKY 1	Private	C, S	50%	English	Generalist	Adv.
SKY NEWS	Private	C, S	45%	English	News, Documentaries	Adv.
EUROSPORT	Private	C, S	40%	English	Sport	Adv.

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ITV	Private	T, C	70%	English	Generalist	Adv.
BBC 1	Public	T, C	72%	English	Generalist	L–F
BBC 2	Public	T, C	66%	English	Generalist	L–F
CHANNEL 4	Private	T, C	63%	English	Generalist	Adv.

Source: Cable Management Ireland

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/m.	Revenue	Sales H.
SKY SPORTS	1992	C, S	n.a.	English	166	Sport	IR£ 15	Adv., Sub.	In-house

DIGITAL PACKAGES									
Channels	Launch	Diff.	Decoder	Subscr.	Language	No. of ch.	Revenue	Cost/month	Sales H.
SKY DIGITAL	1999	S	n.a.	n.a.	English	n.a.	Adv., Sub.	IEP 299	Sky Sales

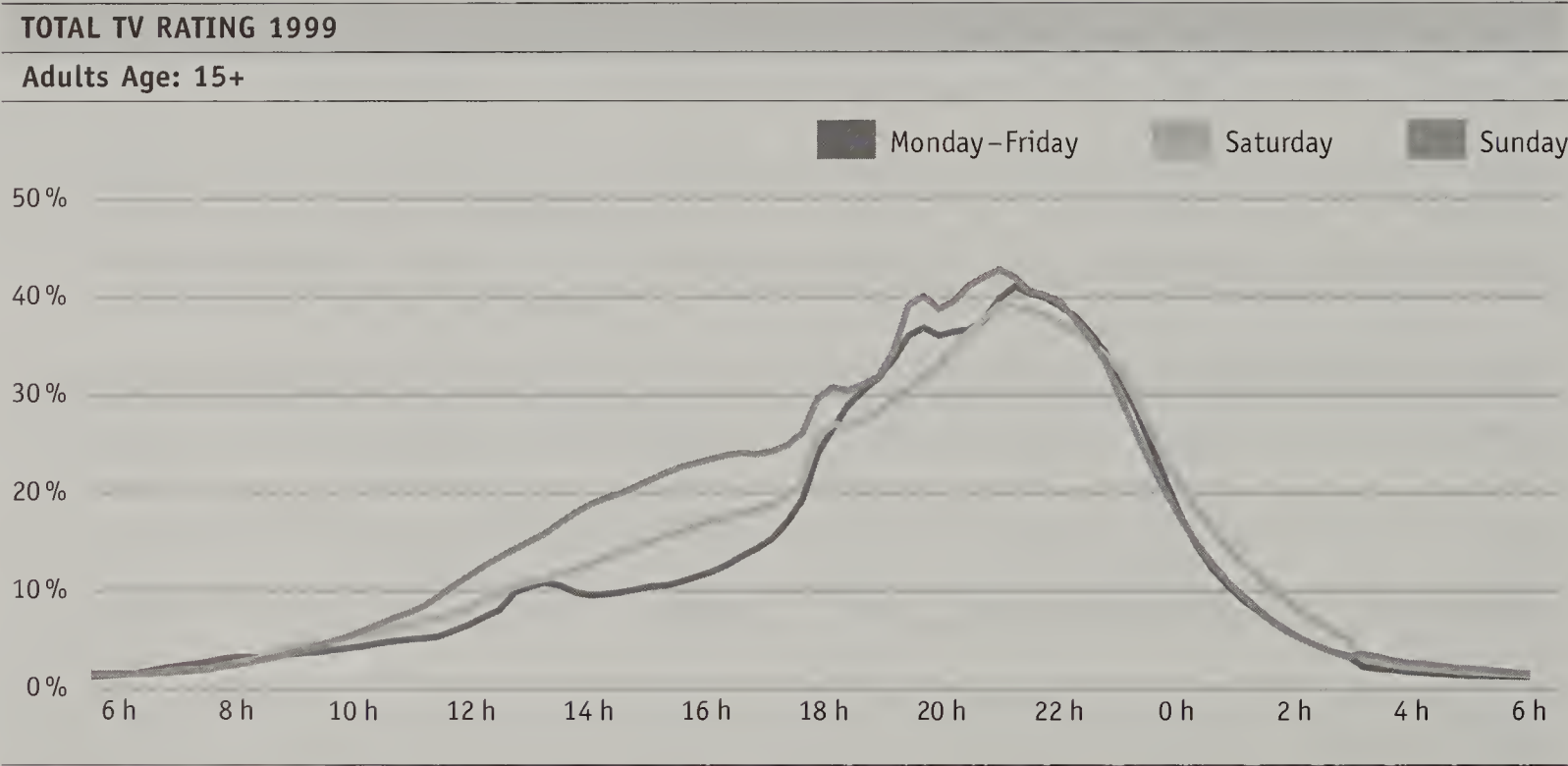
Source: TV International

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	ACNielsen Television Ratings Service	
Panel/Sampling Size	655 households*	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	3 484	
Adults 15+	2 842	
Main Purchase Responsibles 15+	1 448	
Young Adults 15–34	1 186	
Children 4–14	642	

Source: EURODATA TV/ACNielsen

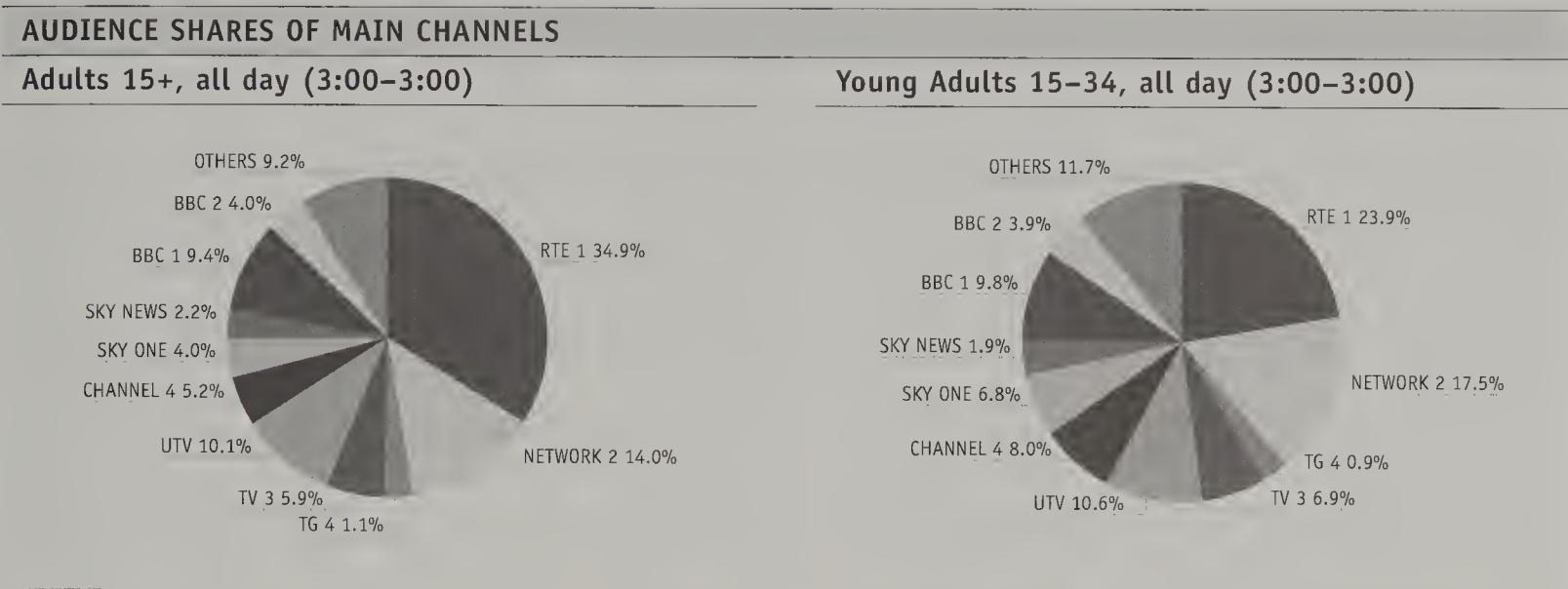
*total number of households in the panel, but 600 households are the basis of the report.



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 15+			Children 4–14			Young Adults 15–34			Main Purchase Responsibles		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	68.9	76.0	73.0	n.a.	n.a.	75.0	61.0	70.0	67.0	77.0	81.0	80.0
Viewing time per Viewer	27.2	259	257	n.a.	n.a.	233	268	256	277	287	276	275
Viewing time per Individual	188	197	188	n.a.	n.a.	175	164	179	186	220	224	220

Source: EURODATA TV/ACNielsen

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 03:00 – 03:00								
	Adults 15+		Young Adults 15–34		Children 4–14		Main Purchase Responsibles	
	1998	1999	1998	1999	1998	1999	1998	1999
RTE 1	37.0%	34.9%	25.0%	23.9%	n.a.	18.2%	42.0%	40.2%
NETWORK 2	15.0%	14.0%	17.0%	17.5%	n.a.	29.6%	14.0%	12.1%
TG 4	1.0%	1.1%	1.0%	0.9%	n.a.	0.9%	1.0%	1.1%
TV 3	n.a.	5.9%	n.a.	6.9%	n.a.	5.7%	n.a.	5.3%
UTV	10.0%	10.1%	11.0%	10.6%	n.a.	7.5%	10.0%	10.4%
CHANNEL 4	6.0%	5.2%	7.0%	8.0%	n.a.	3.0%	5.0%	4.9%
SKY ONE	n.a.	4.0%	n.a.	6.8%	n.a.	6.1%	n.a.	3.0%
SKY NEWS	n.a.	2.2%	n.a.	1.9%	n.a.	0.8%	n.a.	2.2%
BBC 1	10.0%	9.4%	11.0%	9.8%	n.a.	6.6%	10.0%	9.3%
BBC 2	5.0%	4.0%	5.0%	3.9%	n.a.	2.9%	4.0%	3.8%
OTHER	n.a.	9.2%	n.a.	11.7%	n.a.	18.9%	n.a.	7.8%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 15+		Young Adults 15–34		Children 4–14		Main Purchase Responsibles	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	14–18 h	18–23.30 h	14–18 h	18–23.30 h	14–18 h	18–23.30 h	14–18 h	18–23.30 h
RTE 1	27.4%	40.3%	20.0%	27.3%	13.4%	25.8%	32.4%	45.7%
NETWORK 2	15.9%	13.5%	17.6%	18.2%	35.6%	24.1%	14.2%	11.3%
TG 4	0.9%	1.3%	0.8%	1.1%	1.1%	1.1%	0.9%	1.2%
TV 3	6.2%	6.0%	6.8%	7.6%	3.8%	7.7%	6.2%	5.2%
UTV	6.8%	10.9%	8.1%	11.1%	5.5%	9.5%	8.4%	11.4%
CHANNEL 4	7.7%	4.1%	5.6%	5.4%	2.4%	3.1%	8.4%	3.8%
SKY ONE	4.3%	4.0%	6.8%	7.2%	2.9%	8.9%	3.5%	2.8%
SKY NEWS	2.6%	1.3%	2.2%	1.2%	0.7%	0.6%	2.6%	1.3%
BBC 1	9.8%	8.4%	10.4%	9.2%	7.3%	6.6%	9.5%	8.3%
BBC 2	5.8%	3.5%	4.4%	3.7%	2.0%	2.7%	5.8%	3.1%
OTHER	12.6%	6.7%	17.2%	8.0%	25.2%	9.9%	10.0%	5.9%

Source: EURODATA TV/ACNielsen

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
THE LATE LATE SHOW	Ireland	RTE 1	Talk Show	21:34	21/05	44.0%	89.0%
GLENROE	Ireland	RTE 1	Series	20:28	10/01	33.0%	61.0%
CORONATION STREET	UK	RTE 1	Series	19:31	11/01	30.0%	60.0%
THE ROSE OF TRALEE	Ireland	RTE 1	Entertain.	21:36	24/08	29.0%	67.0%
NINE O CLOCK NEWS	Ireland	RTE 1	News	20:56	25/12	29.0%	50.0%
GOLDENEYE	USA	RTE 1	Movie	19:59	01/01	28.0%	58.0%
FAIR CITY	Ireland	RTE 1	Series	19:00	07/01	26.0%	60.0%
CRIMELINE	Ireland	RTE 1	Magazine	21:33	11/01	26.0%	51.0%
MICHAEL COLLINS	USA	RTE 1	Movie	21:08	25/12	26.0%	48.0%
WINNING STREAK	Ireland	RTE 1	Game Show	20:24	30/01	24.0%	61.0%
BUDGET BROADCASTS 19	n.a.	RTE 1	n.a.	21:30	03/12	24.0%	58.0%
LET ME ENTERTAIN YOU	Ireland	RTE 1	Entertain.	19:54	17/01	23.0%	52.0%
GRAND PRIX EUROV. DE LA CHAN. 99		RTE 1	Variety Show	20:00	29/05	22.0%	61.0%
KENNY LIVE	Ireland	RTE 1	Entertain.	21:25	27/02	22.0%	56.0%
SIX ONE NEWS	Ireland	RTE 1	News	18:01	24/01	22.0%	56.0%
BULL ISLAND	Ireland	RTE 1	Series	20:25	25/12	22.0%	40.0%
BEYOND THE HALL DOOR	Ireland	RTE 1	Magazine	19:59	05/03	21.0%	56.0%
GRAND PRIX (NATIONAL CONTEST) 99	Ireland	RTE 1	Variety Show	21:23	07/03	21.0%	49.0%
KEEPING UP APPEARANCE	n.a.	RTE 1	n.a.	20:30	08/01	21.0%	48.0%
E.R.	USA	RTE 1	Series	21:24	10/01	21.0%	44.0%

Source: EURODATA TV/ACNielsen; Base: Adults 15+

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
GOLDENEYE	USA	RTE 1	19:59	01/01	28.0%	58.0%
MICHAEL COLLINS	USA	RTE 1	21:08	25/12	26.0%	48.0%
RANSOM	USA	RTE 1	21:39	08/12	20.0%	56.0%
EXECUTIVE DECISION	USA	RTE 1	21:46	24/03	20.0%	53.0%
HOLY HIJACKER-SEEK	USA	RTE 1	19:58	08/02	20.0%	45.0%
SOMETHING TO TALK ABOUT	USA	RTE 1	21:34	24/02	19.0%	49.0%
FATHER OF THE BRIDE	USA	RTE 1	21:36	22/12	18.0%	56.0%
SHAWSHANK REDEMPTION	USA	RTE 1	21:34	09/04	18.0%	51.0%
PRETTY WOMAN	USA	RTE 1	21:33	06/03	18.0%	50.0%
TWISTER	USA	RTE 1	20:29	25/10	18.0%	44.0%

Source: EURODATA TV/ACNielsen; Base: Adults 15+

TOP 10 SPORT EVENTS					
Title	Channel	Start. Time	Date	Audience	Share
FBAL IRELAND-TURKEY	NET 2	18:31	13/11	19.0%	47.0%
RUGBY W. CUP IRELAND-ARGENTINA	RTE 1	19:29	20/10	18.0%	47.0%
FBAL 1ST SEMI FINALS	NET 2	13:46	22/08	17.0%	63.0%
HURLING/ALL IRELAND FINAL	NET 2	12:36	12/09	17.0%	56.0%
FBAL CL MAN. UTD-BAYERN MUNICH	NET 2	19:15	26/05	17.0%	42.0%
FBAL IRELAND-PARAGUAY	NET 2	19:16	10/02	17.0%	35.0%
FBAL ALL IRELAND FINAL	NET 2	12:35	26/09	16.0%	55.0%
FBAL IRELAND-YUGOSLAVIA	NET 2	19:00	01/09	16.0%	44.0%
FBAL JUVENTUS-MAN. UTD	NET 2	19:27	21/04	16.0%	37.0%
FBAL/ALL IRELAND SEMI FINAL	NET 2	14:10	18/07	15.0%	53.0%

Source: EURODATA TV/ACNielsen; Base: Adults 15+

Top Programmes Channel by Channel

RTE 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE LATE LATE SHOW	Ireland	Talk Show	33	21:34	124	25.0%	62.5%
GLENROE	Ireland	Series	37	20:28	28	24.6%	55.4%
CORONATION STREET	UK	Series	209	19:28	26	22.3%	58.6%
FAIR CITY	Ireland	Series	97	19:00	28	19.9%	57.7%
KENNY LIVE	Ireland	Entertain.	18	21:30	111	19.5%	50.6%
WINNING STREAK	Ireland	Game Show	30	20:19	41	19.2%	49.5%
CRIMELINE	Ireland	Magazine	12	21:34	46	19.0%	44.0%
MAK'EM LAUGH	Ireland	Entertain.	8	19:58	26	18.7%	48.1%
LET ME ENTERTAIN YOU	Ireland	Entertain.	11	19:49	31	17.9%	41.2%
BEYOND THE HALL DOOR	Ireland	Magazine	13	19:59	25	17.8%	46.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE ROSE OF TRALEE	Ireland	Entertainment	24/08	21:36	115	29.0%	67.0%
GOLDENEYE	USA	Movie	01/01	19:59	135	28.0%	58.0%
MICHAEL COLLINS	USA	Movie	25/12	21:08	125	26.0%	48.0%
GRAND PRIX EUROV. DE LA CH. 99	Ireland	Variety Show	29/05	20:00	131	22.0%	61.0%
GRAND PRIX (NAT. CONTEST) 99	Ireland	Variety Show	07/03	21:23	85	21.0%	49.0%
RANSOM	USA	Movie	08/12	21:39	127	20.0%	56.0%
MONICA LEWINSKI INTERVIEW	Ireland	News	04/03	21:33	59	20.0%	46.0%
HOLY HIJACKER-SEEK	USA	Movie	08/02	19:58	56	20.0%	45.0%
EXECUTIVE DECISION	USA	Movie	24/03	21:46	141	20.0%	53.0%
SOLVED AND UNSOLVED	Ireland	Magazine	09/02	20:01	22	20.0%	46.0%

Source: EURODATA TV/ACNielsen

Base: Adults 15+

NETWORK 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FATHER TED	UK	Series	13	21:21	30	13.5%	29.6%
CORONATION STREET	UK	Series	6	21:56	26	10.3%	25.9%
FRIENDS	USA	Series	65	20:53	25	9.9%	23.7%
HOME AND AWAY	Australia	Series	228	18:32	24	7.7%	26.9%
ALLY MCBEAL	USA	Series	23	21:02	48	7.6%	19.7%
VERONICA'S CLOSET	USA	Series	27	21:32	23	7.2%	18.5%
DON'T FEED THE GONDOLAS	Ireland	Comedy	24	22:09	29	7.0%	17.6%
DRIVE	Ireland	Magazine	13	22:12	28	6.8%	17.9%
ACROSS THE LINE	Ireland	Travel	6	21:51	26	6.8%	16.1%
GIMME, GIMME, GIMME	UK	Sitcom	6	22:26	29	6.5%	18.9%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL IRELAND-TURKEY		Sport	13/11	18:31	155	19.0%	47.0%
FBAL/ALL IRELAND FINAL		Sport	22/08	13:46	204	17.0%	63.0%
HURLING/ALL IRELAND FINAL		Sport	12/09	12:36	288	17.0%	56.0%
FBAL CL MUNICH-MANCHESTER		Sport	26/05	19:15	180	17.0%	42.0%
FBAL IRELAND-PARAGUAY		Sport	10/02	19:16	146	17.0%	35.0%
FBAL ALL IRELAND FINAL		Sport	26/09	12:35	295	16.0%	55.0%
FBAL IRELAND-YUGOSLAVIA		Sport	01/09	19:00	170	16.0%	44.0%
FBAL CL JUVENTUS-MAN. UTD		Sport	21/04	19:27	158	16.0%	37.0%
FBAL/ALL IRELAND SEMI FINAL		Sport	18/07	14:10	232	15.0%	53.0%
BEVERLY HILLS COP 2	USA	Movie	16/11	21:00	106	14.0%	33.0%

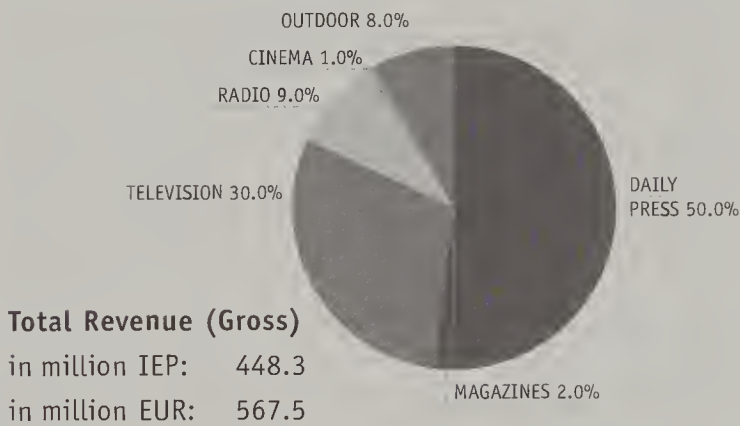
Source: EURODATA TV/ACNielsen

Base: Adults 15+

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend (in million IEP)		448.3
Total adspend (in million USD)		574.7
Total adspend (in million EUR)		567.5
TV adspend (in million IEP)		136.3
TV adspend (in million USD)		174.7
TV adspend (in million EUR)		172.5
TV adspend in % of GDP		0.23
TV adspend per capita (USD)		47.2

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

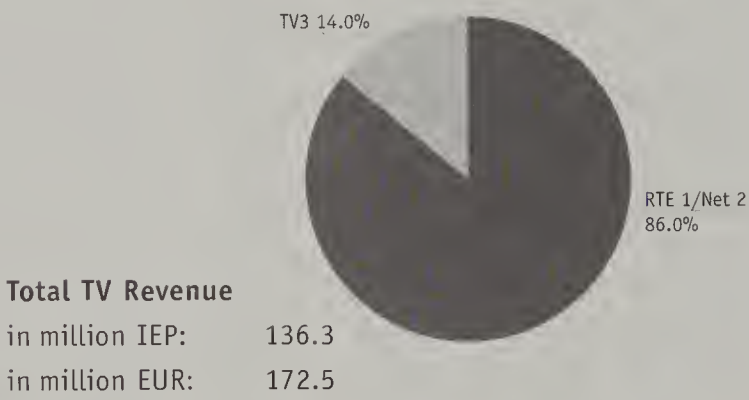


Source: I.A.P.I. 1999

TV ADVERTISING STATISTICS	
Total number of spots broadcast	153 386
Average spot length (in sec.)	30
Total number of advertisers	n.a.
Number of TV advertisers	n.a.
Total number of advertised products	n.a.
Number products advertised on TV	n.a.

Source: I.A.P.I. 1999

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
TOILETRIES/COSMETICS	21.131	16.368	77%	12%
CHOCOLATE/CONFECTIONERY	12.606	10.338	82%	8%
FOOD: CANNED/INSTANT	11.159	8.519	76%	6%
POLISHERS/CLEANSERS	9.306	8.420	90%	6%
BEERS/LAGERS/ALES/CIDERS	13.695	6.025	44%	4%
FOOD: DAIRY PRODUCTS	7.580	5.563	73%	4%
SUPERMARKETS	11.251	5.520	49%	4%
GOVERNMENT DEPARTMENTS	15.311	5.519	36%	4%
TELECOMMUNICATIONS	21.959	5.506	25%	4%
BEVERAGES: SOFT DRINKS	10.166	4.973	49%	4%
OTHERS	314.141	59.522	19%	40%
TV Advertisers				
PROCTER & GAMBLE	n.a.	7.244	n.a.	5.3%
GOVERNMENT DEPARTMENTS	n.a.	5.759	n.a.	4.2%
MARS	n.a.	4.759	n.a.	3.5%
LEVER BROTHERS	n.a.	3.906	n.a.	2.9%
EIRCOM (TELECOM EIREANN)	n.a.	3.806	n.a.	2.8%
KELLOGG'S	n.a.	3.103	n.a.	2.3%
GUINNESS GROUP SALES	n.a.	2.979	n.a.	2.2%
L'OREAL	n.a.	2.786	n.a.	2.0%
CADBURY'S	n.a.	2.585	n.a.	1.9%
VAN DEN BERGH FOODS	n.a.	2.401	n.a.	1.8%
OTHERS	n.a.	96.942	n.a.	71.1%
Total (in 000 IEP)	448 307	136 272	30.0%	100.0%
Total (in 000 EUR)	567 477	172 496	30.0%	100.0%

Source: I.A.P.I. 1999

The main occurrence of 1999, at least in the opinion of most operators, was the dramatic development of the “new economy” which boosted the advertising market. Emerging sectors such as telecommunications, internet-based companies and stock offers were mainly responsible for 12.3% of total market growth.

Although television already has a high level of maturity in Italy, this too benefited from the positive trend of the overall market and obtained a considerable growth rate of 10.4%. In fact, the “new” sectors are characterised by a strong demand for highly qualitative prime time spaces. As a result, television companies were forced to improve their offer qualitatively in order to exploit the already limited inventory of advertising airtime available.

Internet advertising has, of yet, no monitoring system but current estimates evaluate the adspend on this new medium at around 150 billion lira.

As anticipated last year, in July 1999 a decision was finally taken on the renewal of broadcasting licences to the terrestrial channels. Licences went to the two main Mediaset channels: Canal 5 and Italia 1, as well as Telemontecarlo 1 and 2, Telepiu and Europa 7, a newcomer which is not yet on air. Rete 4 was authorised to broadcast ad interim until the cable and satellite equipment rates are high enough. On July 29th, the ministry postponed the release of the eighth licence waiting for verification of the financial structure of the two competitors VIP Rete Mia (HOT Italia) and Rete A (MTV Italia). A final decision is due to be made during 2000.

In the Pay-TV sector, Fininvest, a major Mediaset shareholder, bowed out of Tele+. In the digital sector, there are two main operators becoming clear: D+ (Tele+/Canal+/Vivendi Group) and Stream (35% owned by Murdoch’s News Corporation). Subscriptions to digital pay TV have been increasing, largely due to the Italian passion for football. Both D+ and Stream have a very appealing offer of the Italian premier league matches and offer subscribers the opportunity to subscribe all the matches of specific football clubs. This was possible thanks to a new rule which prevents one single broadcaster from holding more than 60% of the total football rights which are nationally available.

Despite the development in digital television, the general overview of the television market shows us that the mainstream “free” channels still dominate. Rai and Mediaset continued to compete for the top position. Rai 1 had the highest share for individuals (23.3%), while Canal 5 showed the best results for the target groups 15-64 (24.7%) and 15-34 (27.2%), these being the main target groups for advertisers. Telemontecarlo surprisingly had an average audience level of more than 2%.

In August 2000, the takeover of 75% of the television channels Telemontecarlo and Telemontecarlo 2 (TMC) by the Telecom Italia daughter Seat-Tin.it. caused much excitement on the Italian TV market. It is assumed that

this new multimedia holding with television channels, telephone services and internet will decisively alter the face of the traditional media market. Seat/Pagine Gialle plans to appeal to a younger audience, that is already familiar with using the internet.

TV consumption slightly increased in 1999 by 1.4%, reaching 224 minutes daily viewing time for individuals and confirming the Italian audience as one of the largest television consumers in Europe.

Even though the 1999 ranking of top rated programmes was still dominated by soccer and music (Festival di Saremo), Italian fiction and other “home” productions enjoyed more and more popularity. The day time Italian soap “Vivere” equalled the performance of “The Bold and the Beautiful”, while the American stories of “E.R” were outstripped by the more familiar and day by day life of “Il Medico di Famiglia”.

Along with the success of fiction, TV shows enjoyed a healthy revival with the launch of new formats, most of which appeal to younger audiences, for example, “Who Framed Peter Pan?” where children are the main characters, and “Passaparola”, a revised version of traditional quiz shows.

Finally, some improvements occurred during 1999 with respect to audience measuring techniques: in August, the panel was updated to be more consistent with the demographic composition of the Italian population. From now on, such an update will be carried out on a yearly basis.

Italy

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General Data

COUNTRY	
Land area (km²)	301 302
Total population	57 563 000
Number of households	21 193 000
Average household size	2.7
In % of households equipped	
Phone	93.1
Mobile telephone subscribers	58.1
PCs	20.3
Internet	6.7
Internet users	8.0 ¹

Sources: Auditel-RdR 1999/R

¹Osservatorio Internet Italia

ECONOMICS	
GDP in million ITL (at current prices)	1 997 989 520
GDP per capita in ITL (at current prices)	34 362 169
Inflation rate in 1999 (in %)	1.7
Value of ITL in Euro (EUR)	1 EUR = 1936.27 ITL*
Value of ITL in US-Dollar (USD)	1 USD = 1914.07 ITL*

Source: ISTAT-IL SOLE 24 ORE

*Date: 3.1.2000

TV OVERVIEW	
Total number of TV households (TVHH)	20 911 000
In % of all households	98.7
Numbers of channels received by 70% of the population	9
TV License-Fee cost per year	ITL 171 600/EUR 88.62

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.3
Multiset (homes with more than 1 TV set)	49.6
VCR	61.7
Teletext	61.3
Remote control	96.7*

Source: Auditel-RdB 1999/B

*in 1998

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	4.5*
	connected	0.2
Satellite	Private dish/DTH	4.7
	Collective dish/SMATV*	1.0
Terrestrial	analog	100
	digital	3.9
	MMDS	n.a.

*Statistical Yearbook 2000; European Audiovisual Observatory

TV SUBSCRIPTION			
Analog pay TV subscribers*	2.0%	Digital TV subscribers**	0.9%

* TELEPIU' 30th Sept '99, ** CANAL PLUS

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech. Pen.	Language	h/week	Programming	Revenue	Sales H.
RAI 1	1954	T, S	100%	Italian	168	Generalist	L-F, Adv.	Sipra
RAI 2	1954	T, S	100%	Italian	168	Generalist	L-F, Adv.	Sipra
RAI 3	1954	T, S	100%	Italian	168	Generalist	L-F, Adv.	Sipra

Source: Auditel-RdB 1999/B

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diff.	Tech. Pen.	Language	h/week	Programming	Revenue	Sales House
CANALE 5	1980	T, S	100%	Italian	168	Generalist	Adv.	Publitalia '80
ITALIA 1	1981	T, S	100%	Italian	168	Generalist	Adv.	Publitalia '80
RETE 4	1982	T, S	100%	Italian	168	Generalist	Adv.	Publitalia '80
TELEMONTECARLO	1974	T	81%	Italian	168	Generalist	Adv.	Cecchi*
TELEMONTECARLO 2	1996	T	75%	Italian	168	Generalist	Adv.	Cecchi*
EUROPA 7	n.a.	T	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
RETE A/MTV	1997	T	59%	Italian/English	168	Homeshop./Music	Adv.	Rete A/Mtv
TELECAPRI	1977	T	n.a.	Italian	168	Generalist	Adv.	Sogepa/Prs
RETE MIA	n.a.	T	75%	Italian	168	Homeshopping	Adv.	n.a.

Source: Auditel-RdB 1999/B

*Gori Pubbl.

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
EUROSPORT	Private	S	2.3%	Italian/English	Sport	Adv.
EURONEWS	Private	S	1.6%	Multilanguage	News	Adv.
BBC WORLD	Private	S	1.5%	English	News	Adv.
TV5 EUROPE	Public	S	0.8%	French	Generalist	L-F, Spons.
ARTE	Public	S	1.1%	French/German	Cultural	L-F
BLOOMBERG TV	Private	S	0.5%	English	News	Adv.
CNN INTERNATIONAL	Private	S	1.7%	English	News	Adv.
CNBC EUROPE	Private	S	1.2%	English	Finance	Adv.
TNT CARTOON NETWORK	Private	S	1.7%	English	Cartoon	Adv.
MTV EUROPE	Private	T, S	59.0%	English	Music	Adv.

Source: AGB Italia

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
LA CINQUIEME	Public	S	n.a.	French	Education /Discovery	L-F, Adv.
VIVA	Private	S	n.a.	German	Music	Adv.
VIVA 2	Private	S	n.a.	German	Music	Adv.
VOX	Private	S	n.a.	German	Generalist	Adv.
RTL 2	Private	S	n.a.	German	Generalist	Adv.
POLSAT	Private	S	n.a.	Polish	Generalist	Adv.
TV POLONIA	Public	S	n.a.	Polish	Generalist	L-F, Adv.
RTL 7	Private	S	n.a.	Polish	Generalist	Adv.
POLONIA 1	Private	S	n.a.	Polish	Generalist	Adv.
ONYX	Private	S	n.a.	German	Music	Adv.
DSF	Private	S	n.a.	German	Sport	Adv.
N-TV	Private	S	n.a.	German	News	Adv.
PHOENIX	Public	S	n.a.	German	Documentaries	L-F
RTL	Private	S	n.a.	German	Generalist	Adv.
ARD	Public	S	n.a.	German	Generalist	L-F, Adv.
ZDF	Public	S	n.a.	German	Generalist	L-F, Adv.
3 SAT	Public	S	n.a.	German	Generalist	L-F
SUPER RTL	Private	S	n.a.	German	Entertainment	Adv.
SAT 1	Private	S	n.a.	German	Generalist	Adv.
PRO 7	Private	S	n.a.	German	Generalist	Adv.
KABEL 1	Private	S	n.a.	German	Generalist	Adv.

Source: AGB Italia

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscribers	Language	h/week	Programming	Cost/month	Revenue	Sales H.
TELE + BIANCO	1991	T, S	*	Italian	168	Movie, Sport	**	Sub., Adv.	Cairo Pub.
TELE + NERO	1991	T, S	*	Italian	168	Movie, Sport	**	Sub., Adv.	Cairo Pub.

*500 000 subscribers for both TELE + BIANCO and TELE + NERO, **The cost for both TELE + BIANCO and TELE + NERO is ITL 53 000

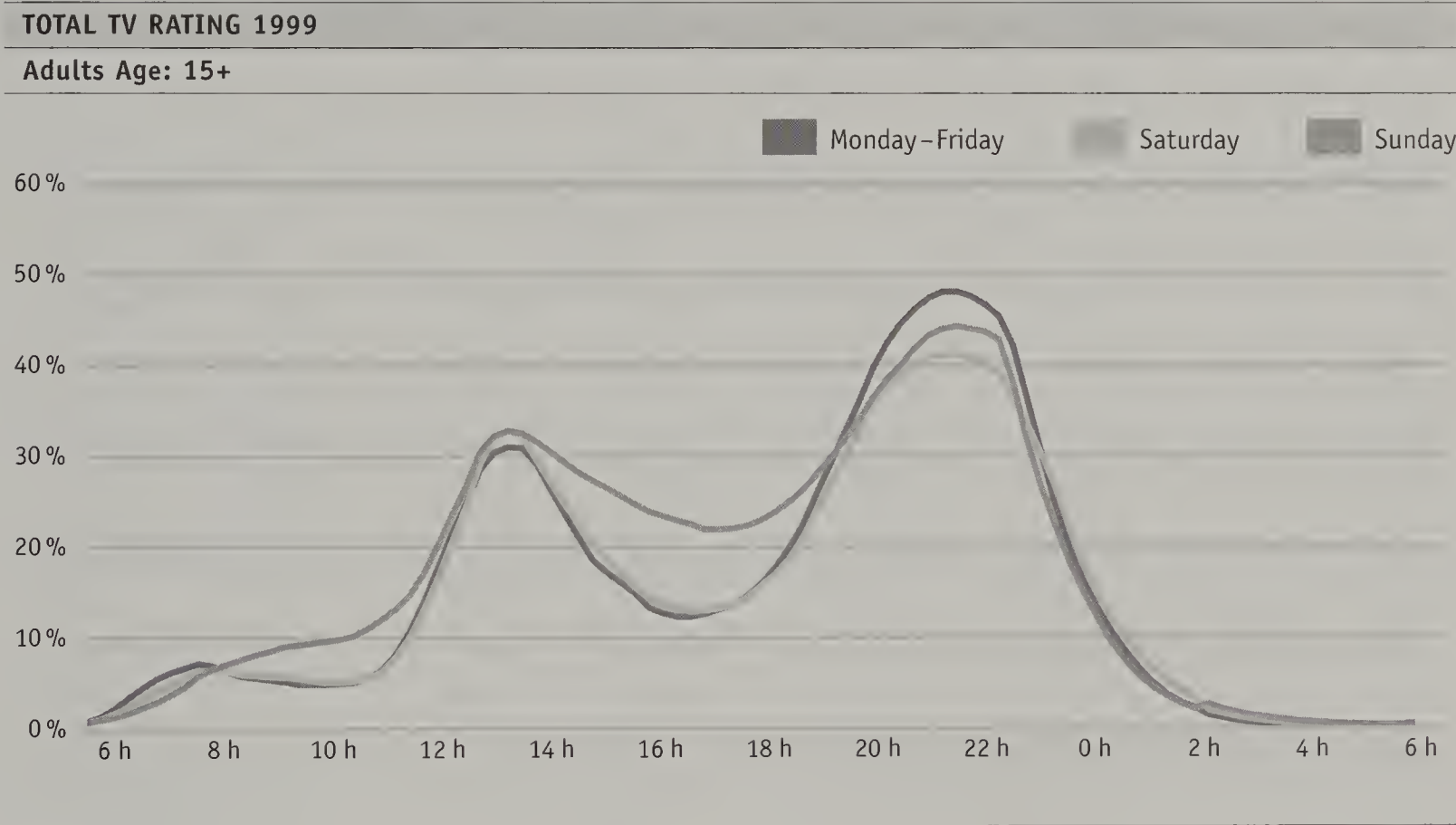
DIGITAL PACKAGES									
Channels	Launch	Diff.	Decoder	Subscribers	Language	No.of ch.	Revenue	Cost/month	Sales H.
D +	1996	S	Gold-box	1 000 000	Italian/English	4-28	Sub., Adv.	57 000*	Cairo Pub.
STREAM	1998	S	n.a.	440 000	Italian/English	19	Sub., Adv.	54 000	In-house

*for the largest offer-28 channels-the cost is 74 000 ITL

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	Auditel-AGB Italia	
Panel/Sampling Size	5 000 households	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	55 430	
Adults 15+	49 181	
Main Purchase Responsibles	21 193	
Young Adults 15-34	16 786	

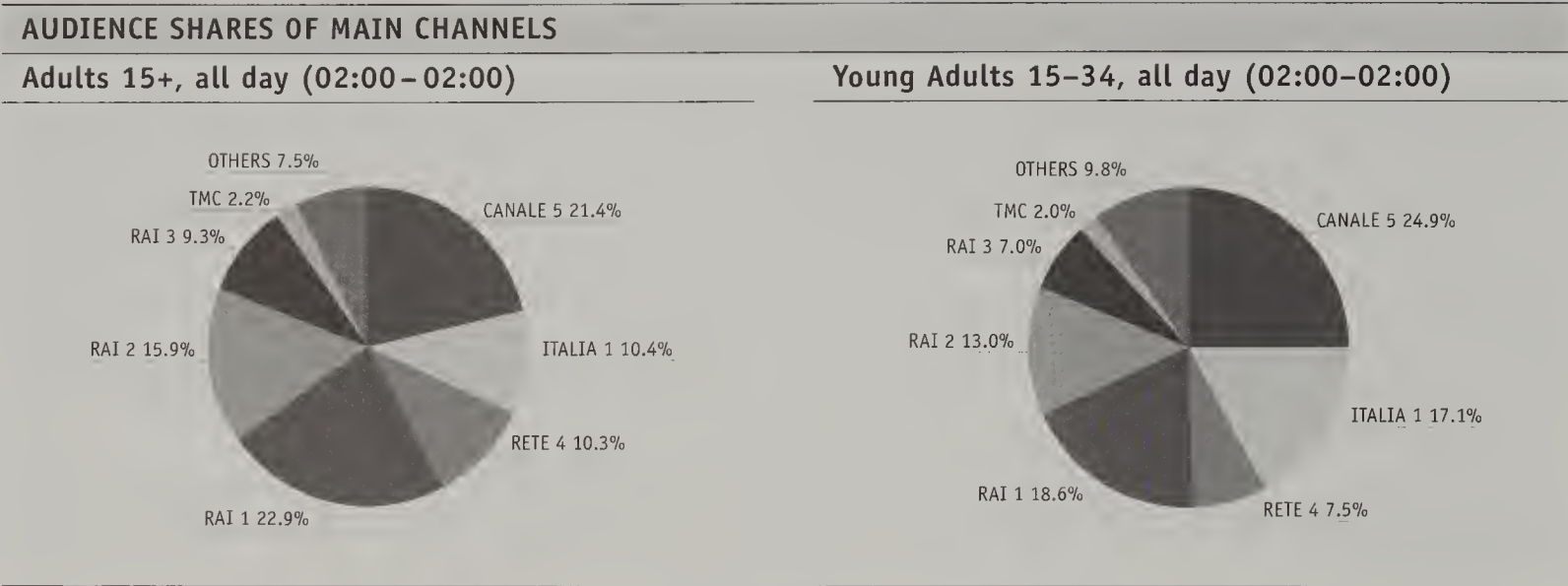
Sources: Auditel AGB, Italia-ISTAT



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)									
	Adults 15+			Young Adults 15-34			Main Purchase Responsibles		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	78	79	80	71	n.a.	n.a.	82	83	84
Viewing time per Viewer	282	290	286	220	n.a.	n.a.	315	321	325
Viewing time per Individual	221	230	229	156	n.a.	n.a.	259	267	274

Source: Auditel, MCS 1999

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00–02:00						
	Adults 15+		Young Adults 15–34		Main Purchase Responsibles	
	1998	1999	1998	1999	1998	1999
CANALE 5	21.0%	21.4%	23.0%	24.9%	21.8%	21.7%
ITALIA 1	10.2%	10.4%	16.8%	17.1%	8.6%	8.8%
RETE 4	9.7%	10.3%	8.1%	7.5%	10.7%	11.4%
RAI 1	23.0%	22.9%	18.9%	18.6%	23.6%	24.0%
RAI 2	16.1%	15.9%	13.1%	13.0%	16.6%	16.5%
RAI 3	9.7%	9.3%	7.7%	7.0%	9.4%	9.1%
TMC	2.6%	2.2%	2.4%	2.0%	2.4%	2.1%
OTHERS	7.7%	7.5%	10.0%	9.8%	6.9%	6.5%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS						
	Adults 15+		Young Adults 15–34		Main Purchase Responsibles	
	Day Time 2:00–20:30 h	Prime Time 20:30–22:30 h	Day Time 2:00–20:30 h	Prime Time 20:30–22:30 h	Day Time 2:00–20:30 h	Prime Time 20:30–22:30 h
CANALE 5	21.5%	20.8%	24.9%	25.0%	22.2%	20.1%
ITALIA 1	10.1%	11.6%	17.4%	16.0%	8.3%	10.4%
RETE 4	10.9%	8.4%	7.6%	7.3%	12.2%	8.9%
RAI 1	22.4%	24.7%	17.9%	20.6%	23.4%	26.0%
RAI 2	16.0%	15.5%	12.9%	13.4%	16.5%	16.4%
RAI 3	9.2%	9.9%	6.7%	8.2%	8.8%	10.1%
TMC	2.2%	2.5%	1.9%	2.4%	2.1%	2.2%
OTHERS	7.8%	6.5%	10.6%	7.1%	6.6%	5.9%

Source: Auditel, MCS 1999

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
FESTIVAL DI SANREMO	Italy	RAI1	Music	20:52	23/02	30.7%	56.9%
CARRAMBA CHE FORTUNA!	Italy	RAI1	Variety Show	20:50	06/01	23.7%	53.3%
FORMULA 1 – MONTECARLO		RAI1	Sport	13:51	16/05	22.3%	64.8%
FBAL EU CHMP QUALIFCATION		RAI1	Sport	20:16	27/03	22.1%	45.7%
FBAL EU CHMP QUALIFICATION		RAI1	Sport	20:48	31/03	22.1%	41.7%
FORMULA 1 – LUXEMBURG		RAI1	Sport	13:50	26/09	21.9%	62.5%
JESUS		RAI1	Series	21:00	06/12	21.9%	40.4%
COMMESSE FRANCESCA	Italy	RAI1	Series–Family	21:00	17/05	21.7%	40.5%
FBAL CL JUVENTUS–MANCHESTER		Canale 5	Sport	20:45	21/04	21.4%	38.4%
FBAL EU. CHMP QUALIFCATION		RAI1	Sport	20:51	08/09	21.2%	46.1%
IL CICLONE	Italy	Canale 5	Movie	21:02	08/11	21.2%	39.2%
FBAL CL MANCHESTER–JUVENTUS		Canale 5	Sport	20:45	07/04	21.1%	38.2%
FBAL CL INTER–MANCHESTER		Canale 5	Sport	20:45	17/03	20.7%	37.6%
APERTURA DELLA PORTA SANTA	Italy	RAI1	Magazine	22:55	24/01	20.2%	62.9%
FORMULA 1 – BRAZIL		RAI1	Sport	18:49	11/04	20.1%	53.8%
MISS ITALIA '99	Italy	RAI1	Variety Show	20:46	05/09	19.9%	55.5%
FRANCAMENTE ME NE INFISCHIO	Italy	RAI1	Variety Show/Music	21:02	28/10	19.8%	39.7%
STRISCIA LA NOTIZIA	Italy	Canale 5	Magazine	20:38	14/01	19.8%	36.7%
ALDO GIOVANNI & GIACOMO SHOW	Italy	Canale 5	Comedy Show	20:43	28/11	19.5%	35.8%
ALDO GIOVANNI & GIACOMO SHOW	Italy	Canale 5	Comedy Show	20:43	28/11	19.5%	35.8%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
IL CICLONE	Italy	Canale 5	21:02	08/11	21.2%	39.2%
INDEPENDENCE DAY	USA	Canale 5	21:08	12/04	17.4%	35.2%
IT TAKES TWO	USA	RAI 1	21:00	01/02	17.0%	30.0%
THE NUTTY PROFESSOR	USA	Canale 5	21:05	11/10	15.8%	31.6%
THE FUGITIVE	USA	RAI 1	20:56	13/09	15.1%	33.4%
LA STRADA PER IL PARADISO	Italy	RAI 1	21:06	15/02	14.8%	28.7%
EXECUTIVE DECISION	USA	Canale 5	21:01	19/04	14.6%	29.7%
BEFORE AND AFTER	USA	RAI 1	20:54	27/09	14.6%	29.1%
THE ERASER	USA	Canale 5	21:05	15/11	14.4%	29.8%
BOGUS	USA	RAI 1	21:02	29/11	14.2%	27.4%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FORMULA 1 – MONTECARLO		RAI1	13:51	16/05	22.3%	64.8%
FBAL EU CHMP DENMARK–ITALIA		RAI1	20:16	27/03	22.1%	45.7%
FBAL EU CHMP ITALY–BELARUS		RAI1	20:48	31/03	22.1%	41.7%
FORMULA 1 – LUXEMBURG		RAI1	13:50	26/09	21.9%	62.5%
FBAL CL JUVENTUS–MANCHESTER		Canale 5	20:45	21/04	21.4%	38.4%
FBAL EU CHMP ITALY–DENMARK		RAI1	20:51	08/09	21.2%	46.1%
FBAL CL MANCHESTER–JUVENTUS		Canale 5	20:45	07/04	21.1%	38.2%
FBAL CL INTER–MANCHESTER		Canale 5	20:45	17/03	20.7%	37.6%
FORMULA 1 – BRAZIL		RAI1	18:49	11/04	20.1%	53.8%
FBAL EU CHMP BELARUS–ITALY		RAI1	20:34	09/10	18.9%	45.1%

Source: AUDITEL 1999, Target Adults

Top Programmes Channel by Channel

RAI 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
49th FESTIVAL OF SANREMO	Italy	Music	5	20:52	161	27.8%	55.4%
FRANCAMENTE ME NE INFISCHIO	Italy	Variety Show	4	20:52	127	18.9%	39.0%
CARRAMBA CHE FORTUNA!	Italy	Variety Show	14	20:46	165	17.9%	40.1%
MEDICO DE FAMILIA	Italy/Spain	Series-Family	21	20:48	54	15.9%	31.8%
COMMESSE	Italy	Series-Family	12	20:51	104	14.3%	28.7%
C'ERA UN RAGAZZO	Italy	Music	8	20:52	133	13.1%	30.3%
PER TUTTA LA VITA	Italy	Variety Show	15	20:53	15	13.0%	30.8%
IL FATTO DI ENZO BIAGI	Italy	Magazine	122	20:29	6	12.9%	25.1%
WANNA BET	Italy	Game Show	7	20:58	147	12.8%	27.9%
KOMMISSAR REX	Germany	Series-Crime	10	20:55	52	11.3%	21.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FORMULA 1 – MONTECARLO		Sport	16/05	13:51	n.a.	22.3%	64.8%
FBAL EU CHMP DENMARK-ITALIA		Sport	27/03	20:16	n.a.	22.1%	45.7%
FBAL EU CHMP ITALY-BELARUS		Sport	31/03	20:48	n.a.	22.1%	41.7%
FORMULA 1 – LUXEMBURG		Sport	26/09	13:50	n.a.	21.9%	62.5%
FBAL EU CHMP ITALY-DENMARK		Sport	08/09	20:51	n.a.	21.2%	46.1%
OPENING THE HOLY DOOR	Italy	Magazine	24/01	22:55	62	20.2%	62.9%
FORMULA 1 – BRAZIL	Italy	Sport	11/04	18:49	n.a.	20.1%	53.8%
FBAL EU CHMP BELARUS-ITALY		Sport	09/10	18,9%	n.a.	18.9%	45.1%
C'ERA UN RAGAZZO BIS		Music	18/02	21:05	142	18.7%	37.4%
MATRIMONIO A QUATTRO MANI		Movie	01/02	21:00	98	17.0%	30.0%

Source: Auditel 1999, Target Adults

RAI 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
UN PRETE TRA NOI 2	Italy	Series-Family	6	21:02	101	11.4%	22.1%
QUELLI CHE IL CALCIO	Italy	Magazine	26	14:27	125	9.9%	33.8%
FURORE	Italy	Game Show	13	21:00	128	9.3%	19.6%
INCANTESIMO	Italy	Series-Mysterious	18	21:01	111	8.7%	18.2%
DERRICK	Germany	Series-Crime	27	21:02	61	7.9%	14.8%
L'ULTIMO VALZER	Italy	Variety Show	6	21:01	153	7.9%	17.6%
CLASS MEETING	Italy	Reality Show	21	20:55	21	7.1%	16.0%
TG2-COSTUME E SOCIETA'	Italy	Magazine	198	13:26	21	7.0%	21.6%
E.R.	USA	Series-Medical	32	21:01	99	6.8%	15.2%
NIKITA	Italy	Series-Action	19	21:00	44	6.0%	15.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
I FATTI VOSTRI SPECIALE	Italy	Magazine	30/04	21:03	120	12.7%	27.0%
IL COMMISSARIO MONTALBANO	Italy	Series-Crime	6+13/05	21:01	114	12.6%	26.7%
SLEEPERS	USA	Movie	29/04	21:02	143	12.2%	25.7%
AMA IL TUO NEMICO	n.a.	TV-Movie	9+13/02	21:01	105	12.0%	21.9%
THE SECRET GARDEN	USA/UK	Movie	28/12	21:02	99	11.3%	22.7%
L'ULTIMO ANELLO DELL'INGANNO	n.a.	TV-Movie	21/12	21:03	91	11.2%	22.6%
CRIMSON TIDE	USA	Movie	11/05	21:02	112	10.6%	22.1%
POLICEMEN	Italy	Movie	16/02	21:02	88	10.6%	20.9%
LA DONNA DEL TRENO	n.a.	TV-Movie	2+4/03	21:02	103	10.3%	19.4%
LA VITA DI MIO FIGLIO	n.a.	TV-Movie	10/02	21:03	96	10.2%	18.4%

Source: Auditel 1999, Target Adults

RAI 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
WHO HAS SEEN ...	Italy	Mag./Real. Show	33	20:38	103	6.8%	13.0%
MI MANDA RAI TRE	Italy	Magazine	34	20:29	102	6.0%	11.5%
ELISIR	Italy	Magazine	31	20:39	109	5.2%	10.6%
LA GRANDE STORIA	Italy	Documentary	14	20:42	104	4.5%	8.9%
UN POSTO AL SOLE	Italy	Ser.-Daily Soap	129	20:04	129	4.4%	9.9%
CIRCUS	Italy	Variety Show	15	20:38	100	4.1%	10.0%
FRIENDS	USA	Sitcom	73	20:05	23	3.9%	8.3%
SUPERMAN	USA	Series-Action	41	19:56	47	3.2%	6.2%
SUSAN	USA	Sitcom	8	19:59	8	2.8%	6.7%
HAREM	Italy	Talk Show	28	22:59	59	2.6%	11.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
LE DUE FACCE DELLA LEGGE	n.a.	TV-Movie	21/10	20:54	91	7.9%	14.8%
LETHAL WEAPON	USA	Movie	20/05	20:49	105	7.9%	15.6%
A FEW GOOD MEN	USA	Movie	15/04	20:38	134	7.8%	15.1%
SNIPER	USA	Movie	21/01	20:58	96	7.4%	13.9%
LETHAL WEAPON 2	USA	Movie	27/05	20:45	110	7.4%	16.0%
DANKO	USA	Movie	14/01	20:53	101	7.2%	13.5%
BOTTE DI NATALE	Ger./It./USA	Movie	09/12	20:57	104	6.8%	13.0%
ON DEADLY GROUND	USA	Movie	25/03	20:55	100	6.7%	13.1%
HARD TO KILL	USA	Movie	04/03	20:56	94	6.6%	12.3%
LA TESTIMONE	n.a.	TV-Movie	n.a.	20:50	96	6.5%	12.5%

Source: Auditel 1999, Target Adults

RETE 4							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
BRAVO BRAVISSIMO	Italy	Children/Music	7	20:35	122	6.0%	12.6%
AMICO MIO	Italy	TV-Movie	9	20:28	116	5.7%	11.0%
FORUM	USA	Reality Show	246	11:33	111	4.4%	20.6%
LA MACCHINA DEL TEMPO	Italy	Documentary	25	20:41	143	4.2%	8.3%
FORUM DI SERA	USA	Reality Show	11	20:33	133	4.1%	7.8%
WHEEL OF FORTUNE	USA	Game Show	246	13:56	58	3.2%	11.9%
COLOMBO	USA	Series-Crime	95	19:27	62	3.1%	7.0%
STIRPE REALE	Italy	Magazine	4	20:30	123	2.9%	11.1%
DELLAVENTURA	n.a.	Series	15	19:34	54	2.9%	6.7%
IL RITORNO DI COLOMBO	USA	Series-Crime	7	19:35	55	2.9%	6.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FACCIA DI RAME	n.a.	Movie	19/01	20:52	118	8.4%	16.2%
RISING SUN	USA	Movie	21/03	20:40	148	7.5%	15.7%
CLEAR AND PRESENT DANGER	USA	Movie	19/10	20:38	158	7.5%	15.3%
THE CLIENT	USA	Movie	23/11	20:39	173	7.1%	14.6%
BAD GIRLS	USA	Movie	16/02	20:41	107	6.9%	13.6%
THE UNTOUCHABLES	USA	Movie	05/10	20:44	132	6.8%	14.3%
FRANTIC	USA	Movie	26/01	20:51	139	6.6%	13.2%
VIVA NAPOLI	Italy	Movie	n.a.	20:41	133	6.4%	13.9%
FAR AND AWAY	USA	Movie	03/11	20:38	156	6.3%	12.9%
THE HUNT FOR RED OCTOBER	USA	Movie	18/05	20:40	153	6.3%	13.6%

Source: Auditel 1999, Target Adults

CANALE 5							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
CANDID CAMERA	Italy	Comedy Show	11	20:59	142	15.1%	33.3%
ALDO GIOVANNI&GIACOMO	Italy	Comedy Show	4	20:41	106	15.1%	30.5%
STRISCIA LA NOTIZIA	Italy	Magazine	212	20:26	21	13.7%	28.0%
CHI HA INCASTRATO PETER PAN?	Italy	Comedy Show	7	20:58	122	11.5%	24.6%
CANDID CAMERA IN TV	Italy	Comedy Show	4	21:00	105	11.3%	21.9%
DIETRO LE QUINTE MALEDETTE	Italy	News/Comedy Show	6	20:55	15	10.5%	18.7%
THE BOLD AND THE BEAUTIFUL	USA	Soap	257	13:36	27	10.4%	33.4%
SQUADRA MOBILE SCOMPARSI	Italy	Series–Action	8	21:00	8	10.4%	20.8%
CIAO DARWIN 2	Italy	Comedy Show	13	20:57	152	10.4%	25.1%
ANNI '60	Italy	Series–General	4	20:39	115	10.0%	21.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CL JUVENTUS–MANCHESTER		Sport	21/04	20:45	n.a.	21.4%	38.4%
IL CICLONE	Italy	Movie	08/11	21:02	108	21.2%	39.2%
FBAL CL MANCHESTER–JUVENTUS		Sport	07/04	20:45	n.a.	21.1%	38.2%
FBAL CL INTER–MANCHESTER		Sport	17/03	20:45	n.a.	20.7%	37.6%
INTERNATIONAL TV AWARDS	Italy	Variety Show	04/05	21:00	155	19.0%	38.9%
INDEPENDENCE DAY	USA	Movie	12/04	21:08	156	17.4%	35.2%
ULTIMO LA SFIDA	ITALY	Series Action	09/11	21:06	110	16.5%	32.0%
THE NUTTY PROFESSOR	USA	Movie	11/10	21:05	109	15.8%	31.6%
EXECUTIVE DECISION	USA	Movie	19/04	21:01	142	14.6%	29.7%
THE ERASER	USA	Movie	15/11	21:05	123	14.4%	29.8%

Source: Auditel 1999, Target Adults

ITALIA 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MATRICOLE	Italy	Comedy Show	7	20:47	140	7.9%	15.6%
IL BRUTTO ANATROCCOLO	Italy	Comedy Show	8	20:40	144	7.1%	14.2%
COMICI	Italy	Comedy Show	6	20:46	137	7.1%	14.4%
SHOOTING STARS	Italy	Comedy Show	8	20:39	144	6.7%	14.1%
FESTIVALBAR '99	Italy	Music	10	20:45	144	6.7%	17.7%
ANGELI	Italy	Docu-Soap	5	20:41	115	6.2%	13.4%
TEMPI MODERNI	Italy	Talk Show	12	20:40	134	6.7%	13.4%
MAI DIRE GOL	Italy	Sport/Comedy Show	19	20:30	67	5.8%	11.8%
MOBY DICK	Italy	Magazine	19	20:40	19	5.5%	11.3%
SARABANDA	Italy	Game Show	252	19:54	252	5.0%	11.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
I CORTI DI ALDO*	Italy	Comedy Show	27/04	20:47	146	11.3%	21.5%
ADVERTISING AWARDS	Italy	Variety Show	09/02	20:51	147	10.3%	20.6%
JOHNNY STECCHINO	Italy	Movie	22/03	20:45	142	8.9%	16.9%
PANAREA	Italy	Movie	15/03	20:45	106	8.6%	15.9%
TURBULENCE	USA	Movie	05/03	20:46	105	8.4%	16.6%
WATERWORLD	USA	Movie	12/03	20:46	142	8.2%	16.9%
TWELVE MONTHS	USA	Movie	03/02	20:45	147	8.1%	15.8%
ANOTHER 48 HOURS	USA	Movie	20/01	20:45	106	7.9%	15.1%
COMMANDO	USA	Movie	02/04	20:46	98	7.8%	17.6%
SORVEGLIATO SPECIALE	n.a.	Movie	05/02	20:45	122	7.3%	14.2%

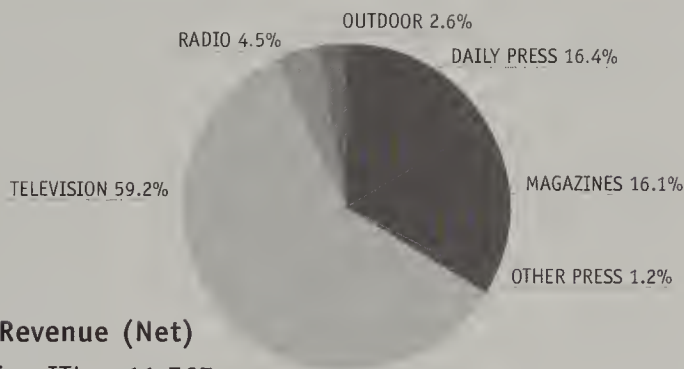
Source: Auditel 1999, Target Adults

*GIOVANNI&GIACOMO

Advertising Expenditure

ADVERTISING FIGURES	GROSS	NET
Total adspend (in billion ITL)	38 847	11 767
Total adspend (in million USD)	20 296	6 148
Total adspend (in million EUR)	20 063	6 077
TV adspend (in billion ITL)	12 862	6 968
TV adspend (in million USD)	6 720	3 640
TV adspend (in million EUR)	6 643	3 599
TV adspend in % of GDP	0.65	0.35
TV adspend per capita (USD)	116.8	63.3

SHARE OF MEDIA EXPENDITURE	NET
Category: Market Share in %	

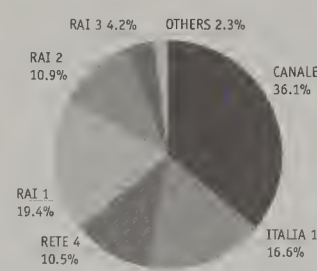


Total Revenue (Net)
in billion ITL: 11 767
in million EUR: 6 077

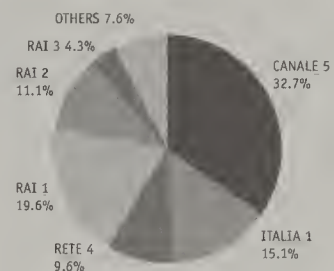
TV ADVERTISING STATISTICS	
Total number of spots broadcast	844 640
Average spot length (in sec.)	22.2
Total number of advertisers	13 996
Number of TV advertisers	1 336
Total number of advertised products	28 959
Number products advertised on TV	3 890

Sources: AC Nielsen /Auditel ; MediaConsultantService

SHARE OF TV ADVERTISING REVENUE	NET/GROSS
Channels: Advertising Market Share in %	



Total Revenue (Net)
in billion ITL: 6 968
in million EUR: 3 599



Total Revenue (Gross)
in billion ITL: 12 862
in million EUR: 6 643

TOP 10 ADVERTISING FIGURES NET				
TV Advertising Sectors	4 Media*	Television	Spent in TV	Share of TV Expenditure
FOOD AND CONFECTIONARY	1 427 060	1 272 024	89.1%	18.3%
OFFICE AUTOMATION AND TELECOM	1 210 544	687 549	56.8%	9.9%
AUTOMOTIVE	1 256 692	640 852	51.0%	9.2%
PUBLISHING AND EDUCATIONAL	814 241	494 576	60.7%	7.1%
DRINKS	603 986	491 848	81.4%	7.1%
TOILETRIES	574 125	482 364	84.0%	6.9%
CANNED AND FROZEN FOOD	506 915	440 857	87.0%	6.3%
COSMETICS & PERSONAL CARE	500 550	222 300	44.4%	3.2%
CLOTHING	781 187	215 094	27.5%	3.1%
FINANCE AND INSURANCE	423 405	150 916	35.6%	2.2%
OTHER	3 668 276	1 870 228	51.0%	26.8%
TV Advertisers				
FERRERO	286 193	272 150	95.1%	3.9%
BARILLA	221 762	210 819	95.1%	3.0%
UNILEVER DIV. SAGIT	164 762	151 649	92.0%	2.2%
PROCTER&GAMBLE	162 385	151 635	93.4%	2.2%
NESTLE	141 192	128 765	91.2%	1.8%
OMNITEL	161 401	120 292	74.5%	1.7%
TELECOM IT. MOBILE	178 299	120 198	67.4%	1.7%
SAIPO (L'OREAL)	142 403	111 735	78.5%	1.6%
INFOSTRADA	135 296	108 841	80.4%	1.6%
TELECOM ITALIA	173 261	97 028	56.0%	1.4%
OTHER	10 000 027	5 495 496	55.0%	78.9%
Total (in million ITL)	11 766 981	6 986 608	59.2%	100.0%
Total (in million EUR)	6 077	3 599	59.2%	100.0%

Source: AC Nielsen-net figures

*TV, press, radio and outdoor

Luxembourg

Although it is a small country, the Grand Duchy of Luxembourg has one of the largest offers on the TV market in Europe. Thanks to the very good penetration of cable (89%) and with a certain amount of satellite dishes installed in the country, each individual household in Luxembourg can choose between more than 40 channels. There is only one national TV station RTL Tele Lëtzebuerg; most of the other channels presented to the market are foreign channels, mostly of German and French origin. The fact that the foreign communities are still growing and represent about one third of the whole population of the Grand Duchy of Luxembourg increases the demand for Italian, Portuguese, English and Dutch channels.

The strength of RTL Tele Letzebuerg lies in the programming: an hour with Luxembourg content addressed to Luxembourg people. This way, the country's population can keep up with local news and events. What is vital for a channel like RTL Tele Letzebuerg is its proximity and focus on national, regional and local features. Starting every day with a 20 minute children programme, called Häppi Diwwi, composed of cartoons and news for children (with a Luxembourgish touch) at 18.40, RTL Tele Letzebuerg broadcasts 1 hour, divided into a 30 minute magazine and a 30 minute news show. The one hour programme in luxembourgish language has an average audience share of 73% during the live broadcast from 19:00 to 20:00. After the 3 daily repeats of the programme (20:00 to 23:00), the channel reaches an average daily number of 121 500 viewers, which is more than a third of the whole population aged 12+. This could be considered as a European record in terms of audience share. Since the beginning of 2000, a fourth repeat of the main hour (23:00 to 24:00) has been added.

People not only watch RTL Tele Letzebuerg massively, but they have also a great fidelity towards "their" channel. The average viewing time reaches 58 minutes. Since the launch of the new concept and furthermore due to the qualitative fine-tuning of the programmes, the viewers of RTL have been completed by the younger and more active part of the population. So we could easily say that the profile of the viewers of the channel is in phase with the profile of the total population. In order to reach the French speaking people in Luxembourg, a simultaneous translation in French of the news programmes has been applied. This is very important, for the figures show an average reach of 15% of the foreigners living in the grand Duchy and watching RTL Tele Letzebuerg.

The measurement of the television audience is done by the institute ILReS. The recent ILReS TV 2000 survey is based on a 3 500 person telephone interview sample, representing the 368 000 inhabitants aged over 12 and carried out from October 1999 to Mai 2000. There is no electronic measurement in Luxembourg. The results of the survey confirm the absolute leadership of RTL Tele Letzebuerg on the market. This proves that the programming is a huge success story and that people like the national orientated links in the different news and

magazine items. Indeed, in comparison with the years before RTL Tele Letzebuerg has even strengthened its high audience concentration despite the very large basic TV offer.

The regulatory framework is subject to the franchise contract signed between the Government and CLT-UFA. This contract contains public service obligations for RTL Tele Letzebuerg as well as regulations regarding advertising income. As for the legal part, TV in Luxembourg is subject to the Law of 1991, regulating electronic media and liberalising the radio market. Since the beginning of 1998, a Code of Ethics, under the authority of „la Commission Luxembourgeoise pour l' Ethique Publicitaire“ has brought out guidelines for the creative content of advertisements.

Advertising is regulated in accordance to the EU directive "Television without frontiers", which was drawn up in Luxembourg in 1991. The advertising expenditure in TV has continued to grow since January 1996, when advertising obtained complete access to the entire programme. In 1999, as in previous years, the growth in TV is still higher (20%) than the growth of the entire market (+9%). In the last years, audio-visual media, TV, radio and cinema, continued to increase their market share to the detriment of print. In the last three years the market share of TV grew from 9.8% till 11.1%. This is especially due to the increase of the investments of international brand names and the appearance of new international brand names on TV that were not present in Luxembourg before. Also thanks to the liberalisation of the telecommunication sector the investments in television grew. Three main players in that sector took their place in the top 5 investments on television.

Even though a national channel in Luxembourg could be compared to a regional or even local channel in other countries, RTL Tele Letzebuerg continued to make efforts to keep the CPT competitive on an international level. The system with 4 re-diffusion of each television spot allows the advertiser to reach a maximum of viewers. Combined with radio, RTL reaches 7 Luxembourgers out of 10 on an average weekday.

Luxembourg

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General Data

COUNTRY	
Land area (km ²)	2 586
Total population	432 500
Number of households	160 000
Average household size	2.7
In % of households equipped	
Phone	99.0
Mobile telephone subscribers	41.0
PC's	43.0
Internet access	17.0 ¹
Internet users	30.0

¹ European Media Watch

ECONOMICS	
GDP in million LUF (at current prices)	731 822
GDP per capita in LUF (at current prices)	1 692 073
Inflation rate in 1999 (in %)	1.0
Value of LUF in Euro (EUR)*	1 EUR = 40.34 LUF
Value of LUF in US-Dollar (USD)*	1 USD = 40.16 LUF

Sources: ILReS, STATEC

*December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	158 400
In % of all households	99.0
Numbers of channels received by 70% of the population	>40
TV License-Fee cost per year	none

TV EQUIPMENT	
	in % of TVHH
Colour TV	100.0
Multiset (homes with more than 1 TV set)	51.0
VCR	n.a.
Teletext	n.a.
Remote control	n.a.

Sources: ILRes, SES/Astra 2000

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	95.0
	connected	82.0
Satellite	private dish/DTH*	15.5
	collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a

*includes collective dish

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

TV Landscape

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
RTL TELE LETZEBUERG	1969	T, C, S	100%	Lux.	37	Generalist	Adv.	IP Lux.

Source: IPL

INTERNATIONAL/PAN EUROPEAN CHANNELS					
Channels	Nature	Diffusion	Language	Programming	Revenue
EUROSPORT	Private	C, S	French/German	Sport	Adv.
CNN INT.	Private	C, S	English	News	Adv.
TV5 EUROPE	Public	C, S	French	Generalist	L-F, Spon.
BBC WORLD	Public	C, S	English	News	Adv.
MTV	Private	C, S	English	Music	Adv.
TVE INT.	Public	C, S	Spanish	Generalist	L-F, Adv.
RTP INT.	Public	C, S	Portuguese	Generalist	L-F, Adv.
CARTOON NETWORK	Private	C, S	English	Children	Adv.
NAT. GEOGRAPHIC	Private	C, S	English	Documentaries	Adv.
EURONEWS	Private	C, S	German/French	News	Adv.
3 SAT	Public	C, S	German	Generalist	L-F

Source: IPL (with Télé REVUE)

*Estimation IPL

OTHER FOREIGN CHANNELS					
Channels	Nature	Diffusion	Language	Programming	Revenue
ARD	Public	C, S	German	Generalist	L-F, Adv.
ZDF	Public	C, S	German	Generalist	L-F, Adv.
RTL	Private	C, S	German	Generalist	Adv.
SAT 1	Private	C, S	German	Generalist	Adv.
PRO 7	Private	C, S	German	Generalist	Adv.
RTL II	Private	C, S	German	Generalist	Adv.
SWR	Public	C, S	German	Generalist	L-F
SUPER RTL	Private	C, S	German	Entertainment	Adv.
VOX	Private	C, S	German	Generalist	Adv.
KABEL 1	Private	C, S	German	Generalist	Adv.
TM 3	Private	C, S	German	Entertainment	Adv.
WEST 3	Public	C, S	German	Generalist	L-F
BAYERN 3	Public	C, S	German	Generalist	L-F
NORD 3	Public	C, S	German	Generalist	L-F
HESSEN 3	Public	C, S	German	Generalist	L-F
MDR	Public	C, S	German	Generalist	L-F
ORB	Public	C, S	German	Generalist	L-F
PHOENIX	Public	C, S	German	Documentaries	L-F
KINDERKANAL	Public	C, S	German	Children	L-F
VIVA 1	Private	C, S	German	Music	Adv.
VIVA 2	Private	C, S	German	Music	Adv.
DSF	Private	C, S	German	Sport	Adv.
N-TV	Private	C, S	German	News	Adv.
ARTE	Public	C, S	French/German	Cultural	L-F, Spon.
TF 1	Private	C, S	French	Generalist	Adv.
FRANCE 2	Public	C, S	French	Generalist	L-F, Adv.
FRANCE 3	Public	C, S	French	Generalist	L-F, Adv.
M6	Private	C, S	French	Generalist	Adv.
RTL 9	Private	C	French	Generalist	Adv.
RTL-TVI	Private	C, S	French	Generalist	Adv.
CLUB RTL	Private	C	French	Generalist	Adv.
LA UNE (RTBF)	Public	C	French	Generalist	L-F, Adv.
LA DEUX (RTBF)	Public	C	French	Generalist	L-F, Adv.
TCM	n.a.	n.a.	French	n.a.	n.a.
LA CINQUIEME	Public	C, S	French	Educational	L-F, Adv.
RAI UNO	Public	C, S	Italian	Generalist	L-F, Adv.

Source: IPL (with Télé REVUE)

OTHER FOREIGN CHANNELS					
Channels	Nature	Diffusion	Language	Programming	Revenue
RAI DUE	Public	C, S	Italian	Generalist	L–F, Adv.
RTL 4	Private	C	Dutch	Generalist	Adv.
RTL 5	Private	C	Dutch	Generalist	Adv.

Source: IPL (with Télé REVUE)

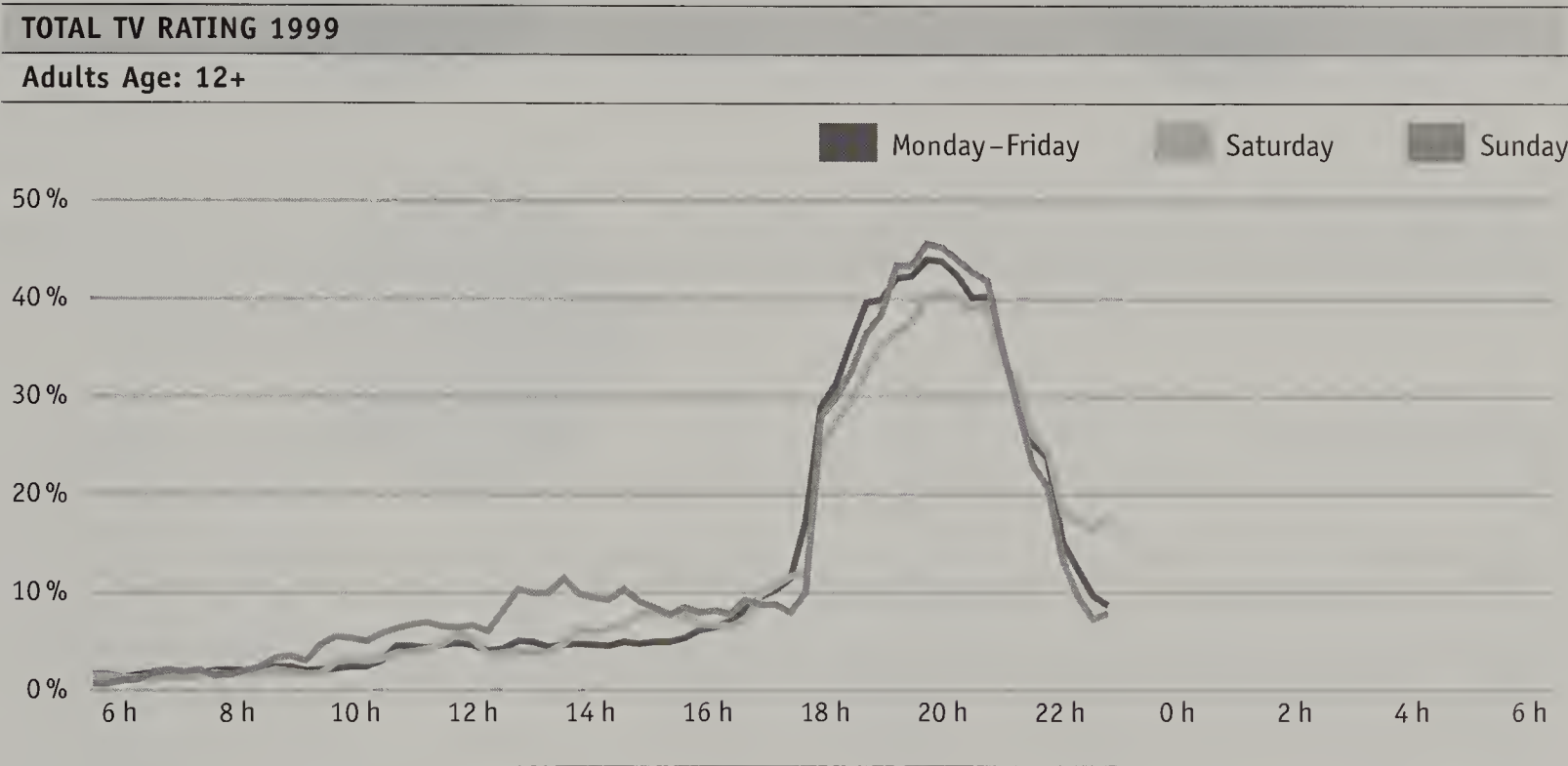
PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/m.	Revenue
CANAL + FRA	1984	C	n.a.	French	168	Generalist, Movies	n.a.	Adv., Sub.
CANAL + BEL	1989	C	n.a.	French	168	Generalist, Movies	n.a.	Adv., Sub.
PREMIERE	1991	C	n.a.	German	168	Movies	n.a.	Adv., Sub.

Source: IPL (with Télé REVUE)

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	ILReS
Panel/Sampling Size	3 500 Individuals
Instrument used (people-meter, telefon, face-to-face)	CATI/Telephone
Population size in 000	
Individuals 12+	368
Luxembourgers 12+	237
Main Purchase Responsibles	230

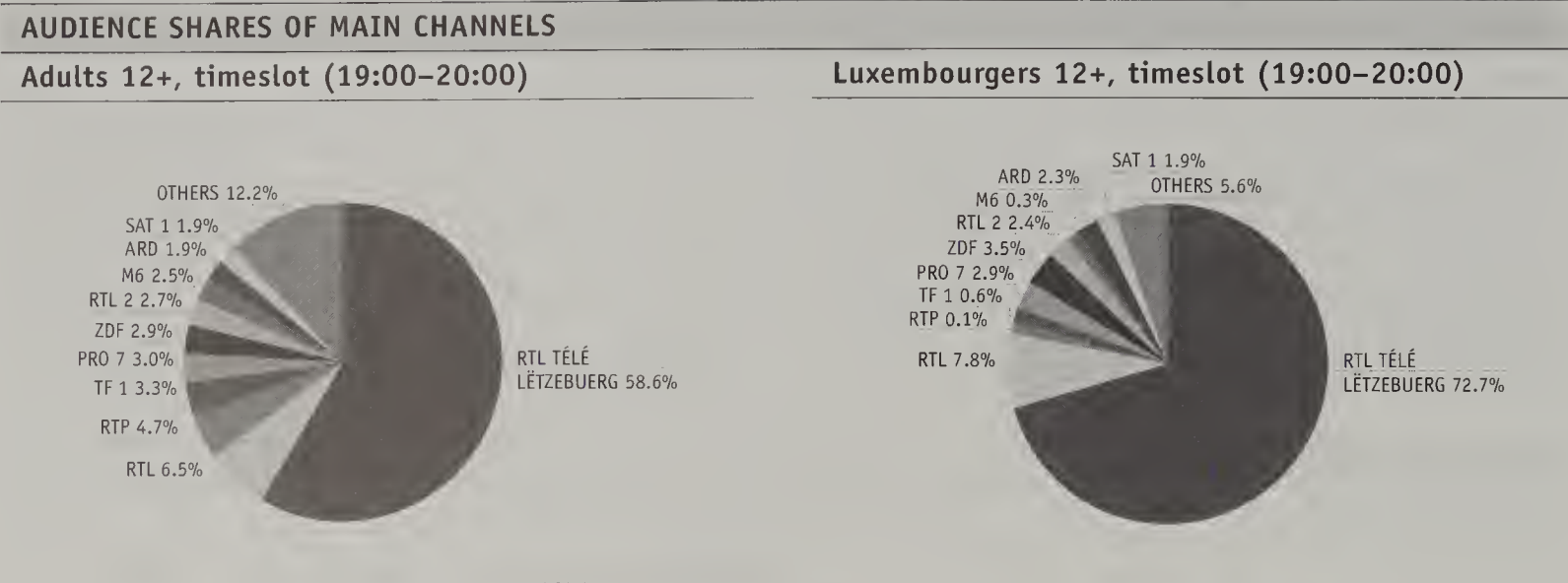
Sources: ILReS/Statec



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)									
	Individuals 12+			Luxembourgers 12+			Main Purchase Responsibles		
	1998	1999	2000	1998	1999	2000	1998	1999	2000
Daily reach in %	74	72	74	74	72	74	75	72	73
Viewing time per Viewer	154	155	168	156	149	161	151	154	172
Viewing time per Individual	115	112	124	112	107	119	117	111	126

Sources: IPL/ILReS TV

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 07:00 – 24:00						
	Adults 12+		Luxembourgers 12+		Main Purchase Responsibles	
	1999	2000	1999	2000	1999	2000
RTL TÉLÉ LËTZEBUERG	15.5%	14.3%	20.8%	20.5%	18.3%	15.8%
RTL	11.0%	9.9%	14.4%	14.5%	10.4%	9.8%
TF 1	9.4%	8.6%	4.8%	4.5%	9.3%	8.0%
PRO 7	9.4%	7.5%	11.4%	9.0%	6.9%	6.1%
ZDF	6.1%	7.1%	8.5%	9.9%	7.3%	8.1%
RTP	5.4%	7.1%	0.2%	0.1%	5.3%	7.7%
ARD	7.6%	7.1%	9.8%	10.2%	8.1%	7.7%
M6	4.0%	5.2%	1.0%	1.1%	3.6%	5.0%
SAT 1	6.2%	4.4%	8.6%	6.1%	6.4%	4.6%
RTL 2	2.9%	4.4%	3.2%	5.2%	2.5%	2.5%
OTHERS	22.5%	24.4%	17.3%	19.0%	21.9%	24.7%

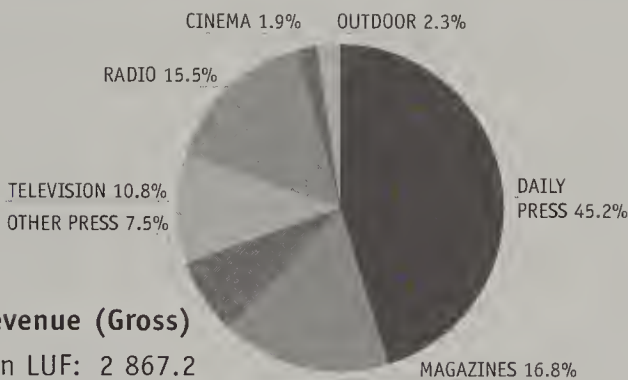
AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS						
	Adults 12+		Luxembourgers 12+		Main Purchase Responsibles	
	Timeslot	Prime Time	Timeslot	Prime Time	Timeslot	Prime Time
	19–20 h	19–23 h	19–20 h	19–23 h	19–20 h	19–23 h
RTL TÉLÉ LËTZEBUERG	58.6%	19.7%	72.7%	26.6%	65.3%	21.3%
RTL	6.5%	8.9%	7.8%	12.2%	5.1%	8.5%
TF 1	3.3%	8.0%	0.6%	4.2%	3.0%	7.8%
PRO 7	3.0%	7.2%	2.9%	8.4%	2.0%	6.2%
ZDF	2.9%	7.7%	3.5%	10.4%	2.7%	8.5%
RTP	4.7%	6.6%	0.1%	0.1%	5.3%	6.6%
ARD	1.9%	7.1%	2.3%	9.7%	2.2%	7.9%
M6	2.5%	4.5%	0.3%	1.1%	1.8%	4.0%
SAT 1	1.9%	4.2%	1.9%	5.5%	1.6%	4.2%
RTL 2	2.7%	4.7%	2.4%	5.4%	1.1%	3.1%
OTHERS	12.0%	21.7%	5.5%	16.4%	9.9%	22.0%

Source: IPL/ILReS TV 2000

Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million LUF)	2 867.2
Total adspend (in million USD)	71.4
Total adspend (in million EUR)	71.1
TV adspend (in million LUF)	309.4
TV adspend (in million USD)	7.7
TV adspend (in million EUR)	7.7
TV adspend in % of GDP	0.04
TV adspend per capita (USD)	17.8

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue (Gross)

in million LUF: 2 867.2

in million EUR: 71.1

Source: Publinvest 1999

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
OFFICE EQUIPMENT (INCL. MOBILE PHONES)	200	65.0	32.5%	21.0%
AUTOMOTIVE	344	42.3	12.3%	13.7%
FINANCE	248	41.1	16.6%	13.3%
SPECIAL RETAIL	676	39.9	5.9%	12.9%
BEVERAGES	152	35.5	23.4%	11.5%
OTHER SERVICES	459	30.2	6.6%	9.8%
FOOD	39	21.5	54.6%	6.9%
GENERAL RETAIL	241	8.1	3.4%	2.6%
CULTURE & LEISURE	244	7.0	2.9%	2.3%
HEALTH & HYGIENE	15	4.8	32.0%	1.5%
OTHERS	250	14.2	5.7%	4.6%
TV Advertisers				
MILLICOM INT.	62.8	37.9	60.4%	12.3%
MOBILUX	46.3	13.0	28.0%	4.2%
VINSMOSELLE	23.3	11.3	48.7%	3.7%
CMD	26.2	9.5	36.3%	3.1%
DECORAMA	11.4	9.1	79.5%	2.9%
BIL	23.1	8.0	34.6%	2.6%
CACTUS	83.7	7.9	9.4%	2.5%
BGL	28.0	7.2	25.7%	2.3%
FORD	19.1	7.1	36.9%	2.3%
BCEE	48.0	6.8	14.2%	2.2%
OTHERS	2 495	191.7	7.7%	62.0%
Total (in million LUF)	2 867	309.4	10.8%	100.0%
Total (in million EUR)	71.1	7.7	10.8%	100.0%

Source: Publinvest 1999

1999 saw the introduction of what are possibly the last generic TV-channels which fit into the extreme competitive TV landscape of the Netherlands. As in 1999 SBS launched its second generic Channel Net 5. The digit 5 in the name was put in to compete with CLT-UFA's RTL 5, for the number 5 position on the remote control. A battle that RTL 5 has won remaining on the number 5 position in over 80% of the households. After a bumpy start Net 5 seems to have gained a solid basis in the landscape though, seeing its market share grow to almost 4% (13+ audience, 18.00–24.00 hrs) over the first six months of 2000.

The other newcomer Fox8 (former TV10) has seen its market share grow from 1.4% in 1999 to 2.3% over the first six months of 2000. Fox8 has been particularly successful in the target group 13–19 year olds, by broadcasting U.S. series like Charmed and Dawson's Creek, and a domestic soap series formally broadcasted by SBS.

Despite the introduction of the above mentioned channels, RTL 4 remained market leader over 1999 with a share of 16.7% (13+ audience, 18.00–24.00 hrs). RTL 4's market share in advertisers most important target group, shoppers 20–49 years was 17.5%. Veronica had a very good year, mainly because of the huge success of Big Brother at the end of 1999 with quite unique ratings. Market shares over 90% were measured during the final broadcast on the 30th of December. Due to this, the channel's market share got a big boost in the last three months of the year and ended up at 10.6% for the whole of 1999 (13+ audience, 18.00–24.00 hrs). Veronica remained very good at attracting a young audience, especially young females. RTL 5 remained solid over 1999 with a 3.8% market share (13+ audience, 18.00–24.00 hrs). With more and more sport in its programming, RTL5 has become very successful in gaining a male audience. Especially the Grand Prix, which was formally broadcasted on RTL4, is attracting a male audience. SBS 6 saw its market share ending a bit higher than the year before.

The public channels had a market share of 37.7% (13+ audience, 18.00–24.00 hrs) being 2.3% lower than the year before. This decrease had much to do with the fact that in 1998 they broadcasted the World Cup. After much discussion, the public channels agreed on the project called 'netprofiling' starting in September 2000. This should end the situation where every public broadcaster broadcasts all their programmes on one public channel. With the 'netprofiling', programmes are not selected for a channel based on their broadcaster, but on their genre. By doing this all three channels get a specific profile into which all programmes have to fit. With this project, the public channels set goal for a market share of 40% in 2001.

The best proof for the fact that there might be too many generic channels in the Netherlands should be the fact that there are substantial rumours that Fox8 is seeking a partner in order to survive.

Meanwhile CLT-UFA has become the full owner of HMG (Holland Media Groep; RTL4, RTL5 and Veronica). The other shareholder Veronica has chosen to sell its share of 35% in HMG in order to focus on digital broadcasting through the broadband internet in the future. HMG in turn remains owner of all the programme-formats and series.

In general, the most important trend has been the tendency towards more and more reality on television. This trend has been visible for a few years in many different formats. And although MTV broadcasted the first episode of 'The Real World' many years ago, the reality concept made a big leap with the introduction of Big Brother in the Netherlands. Big Brother was followed up by many other similar programmes like 'De Bus' (SBS) showing the life of people living in a bus for four months. In September 2000, the second edition of Big Brother will start, again for a period of almost 4 months. The regular (fiction) soap series are being to deal with 'normal' life. In contrast to series like 'The Bold And The Beautiful' that deal with the unreachable, most domestic soap series are about regular people living 'normal' lives. In the past few years we have also seen a growth in the number of documentary soaps showing the work or life of ordinary people. A successful example of this is Schiphol Airport showing the work of people on our national airport. Of course, movies and sports remained as popular as ever in 1999. The Grand Prix broadcast by RTL5 has particularly grown in popularity, making it the second largest sport on television after football.

In 1999, the net expenditure in advertising grew 6.6%. Unlike previous years, it was the press media which showed the lowest growth with 5%.

TV grew almost 9% in 1999, resulting in almost 1.4 billion guilders. The available capacity of television grew with the introduction of Net5. The advertising budget of new economy and telecom advertisers grew very fast in 1999. The year 2000 seems even more promising for television with the latest expectations ending up at around 10 to 15% growth. SBS logically profited the most of the 9% growth over 1999 (because of the introduction of Net5). HMG saw its market share in advertising ending up a bit lower than the year before. HMG still took around 50% of the advertising on television.

Netherlands

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General Data

COUNTRY	
Land area (km²)	41 526
Total population	15 760 200
Number of households	6 740 000
Average household size	2.3
In % of households/population equipped	
Phone	98.1/98.8
Mobile telephone subscribers	n.a./50.0
PC's	54.9/63.1
Internet access	23.5/27.0
Internet users	25.0/32.0

ECONOMICS	
GDP in million NLG (at current prices)	810 350
GDP per capita in NLG (at current prices)	51 417
Inflation rate in 1999 (in %)	2.0
Value of NLG in Euro (EUR)*	1 EUR = 2.20 NLG
Value of NLG in US-Dollar (USD)*	1 USD = 2.19 NLG

Sources: Websites CBS/CPB, Macro Economische Verkenningen 2000 *December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	6 632 000
In % of all households	98.4
Numbers of channels received by 70% of the population	39
TV License-Fee cost per year	NLG 246.-/EUR 112.-

TV EQUIPMENT	
	in % of TVHH
Colour TV	98.0
Multiset (homes with more than 1 TV set)	41.7
VCR	76.4
Teletext	87.0
Remote control	95.4

Sources: Intomart

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	94.2
Satellite	Private dish/DTH	3.8
	Collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	600 000	Digital TV subscribers	230 000

Sources: Intomart, Canal + BV, RMB Netherland

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
NEDERLAND 1	1951	T, C	100%	Dutch	95	Generalist	L-F, Adv.	STER
NEDERLAND 2	1964	T, C	100%	Dutch	105	Generalist	L-F, Adv.	STER
NEDERLAND 3	1988	T, C	100%	Dutch	78	Generalist	L-F, Adv.	STER

Sources: IPN/Intomart

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
RTL 4	1989	C, S	97%	Dutch	122	Generalist	Adv.	IPN sa.
RTL 5	1993	C, S	96%	Dutch	50	Generalist	Adv.	IPN sa.
VERONICA	1995	C, S	97%	Dutch	121	Generalist	Adv.	IPN sa.
SBS 6	1995	C, S	97%	Dutch	114	Generalist	Adv.	SBS
NET 5	1999	C, S	96%	Dutch	129	Generalist	Adv.	SBS
FOX	1995*	C	93%	Dutch	123	Generalist	Adv.	FOX
THE MUSIC FACTORY	1995	C	95%	Dutch	131	Music	Adv.	Arcade
DISCOV. CH. NEDERLAND	1997	C, S	87%	Eng./sub.dutch	126	Document.	Adv.	Ad Valorem
CARTOON NETWORK	1997	C, S	68%	Dutch/Eng.***	112	Children	Adv.	Turner**
KINDERNET	1988	C, S	97%	Dutch	28	Children	Adv.	Kindernet

Sources: IPN/Intomart

*relaunched 1998, **Broadcasting System Netherlands, ***sub. Dutch

DOMESTIC CHANNELS (REGIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
OMROP FRYSLAN	1973	C, T	4.4%	Dutch/Dialect	168	News/Doc./Sport	L-F, Adv.	Regional*
TV NOORD	1995	C, T	4.0%	Dutch	168	News/Doc./Sport	L-F, Adv.	Regional*
OMROEP DRENTHE TV	1995	C, T	4.3%	Dutch/Dialect	168	News/Doc./Sport	L-F, Adv.	Regional*
TV OOST	1992	C, T	6.4%	Dutch/Dialect	168	News/Doc./Sport	L-F, Adv.	Regional*
TV GELDERLAND	1996	C, T	10.1%	Dutch/Dialect	168	News/Doc./Sport	L-F, Adv.	Regional*
TV FLEVOLAND	1997	C, T	7.0%	Dutch	168	News/Doc./Sport	L-F, Adv.	Regional*
TV WEST	1996	C, T	8.5%	Dutch	168	News/Doc./Sport	L-F, Adv.	Regional*
TV RIJNMOND	1989**	C, T	8.8%	Dutch	168	News/Doc./Sport	L-F, Adv.	Regional*
TV ZEELAND	1997	C, T	4.3%	Dutch/Dialect	168	News/Doc./Sport	L-F, Adv.	Regional*
TV 8 BRABANT	1997	C, T	11.5%	Dutch/Dialect	168	News/Doc./Sport	L-F, Adv.	Regional*
L1 TV (LIMBURG)	1999	C, T	6.7%	Dutch/Dialect	168	News/Doc./Sport	L-F, Adv.	Regional*

Source: ORN Nederland

*Regional: Municipality/National: ORN, **relaunched 1997

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
AT 5	1992	T, C	n.a.	Dutch	168	News/Doc./Sport	L-F, Adv.	Regional*

Source: ORN Nederland

*Regional: Municipality/National: ORN

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech.Pen.	Language	Programming	Revenue
VRT TV 1	Public	C	97%	Flamish	Generalist	L-F, Spon.
KETNET/CANVAS	Public	C	97%	Flamish	Generalist	L-F, Spon.
BBC 1	Public	C	96%	English	Generalist	L-F
BBC 2	Public	C	96%	English	Generalist	L-F
ARD	Public	C	98%	German	Generalist	L-F, Adv.
ZDF	Public	C	94%	German	Generalist	L-F, Adv.
NDR	Public	C	24%	German	Generalist	L-F, Adv.
SWR	Public	C	8%	German	Generalist	L-F, Adv.
WDR	Public	C	62%	German	Generalist	L-F, Adv.
RTL	Private	C	52%	German	Generalist	Adv.
SAT 1	Private	C	9%	German	Generalist	Adv.
RAI 1	Public	C	33%	Italian	Generalist	L-F, Adv.
RTBF 1 (LA UNE)	Public	C	14%	French	Generalist	L-F, Adv.

Sources: IPN/Intomart

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech.Pen.	Language	Programming	Revenue
TV 5	Public	C	85%	French	Generalist	L–F, Spon.
BBC WORLD	Private	C, S	18%	English	News	Adv.
CARTOON NETWORK ENG.	Private	C, S	1%	English	Children	Adv.
CNN INT.	Private	C	91%	English	News	Adv.
EURONEWS	Private	C, S	8%	French/English/German	News	Adv.
EUROSPORT	Private	C, S	79%	English/German/Dutch	Sport	Adv.
MBC	Private	C	36%	Arabic	Generalist	Adv.
MTV EUROPE	Private	C	79%	English	Music	Adv.
TRT	Public	C	64%	Turkish	Generalist	L–F, Adv.
NAT. GEOGR. CHANNEL	Private	C	77%	Dutch	Documentaries	Adv.
THE BOX	Private	C	59%	Dutch/English	Music	Telephone*

Sources: IPN/Intomart

*Kind of pay per view-System. Via telephone you dial a number and pay per video-clip

PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Revenue	Sales House
CANAL + 1	1985*	C, S	300 000	Dutch	168	Movie/Sport/Series	Sub., Adv.	RMB
CANAL + 2	1995*	C, S	300 000	Dutch	168	Movie/Sport/Series	Sub., Adv.	RMB

Sources: Canal + BV; cost per month: Per Dish: fl 51.50/Per Cable: fl 62.50– For Both Canal + 1 and 2

*relaunch 1997

DIGITAL PACKAGES									
Channels	Launch	Diff.	Decoder	Subscribers	Language	No.of ch.	Revenue	Cost/month	S. H.
SMART CARD	1997*	S	ASTRA	180 000	Dutch	13	n.a.	Free for subscr.	RMB
SMART CARD**	1997*	S	ASTRA	50 000	Dutch	13***	Sub.	Dfl. 51.50.–	RMB

Sources: RMB Nederland (Sales House)/Canal + BV

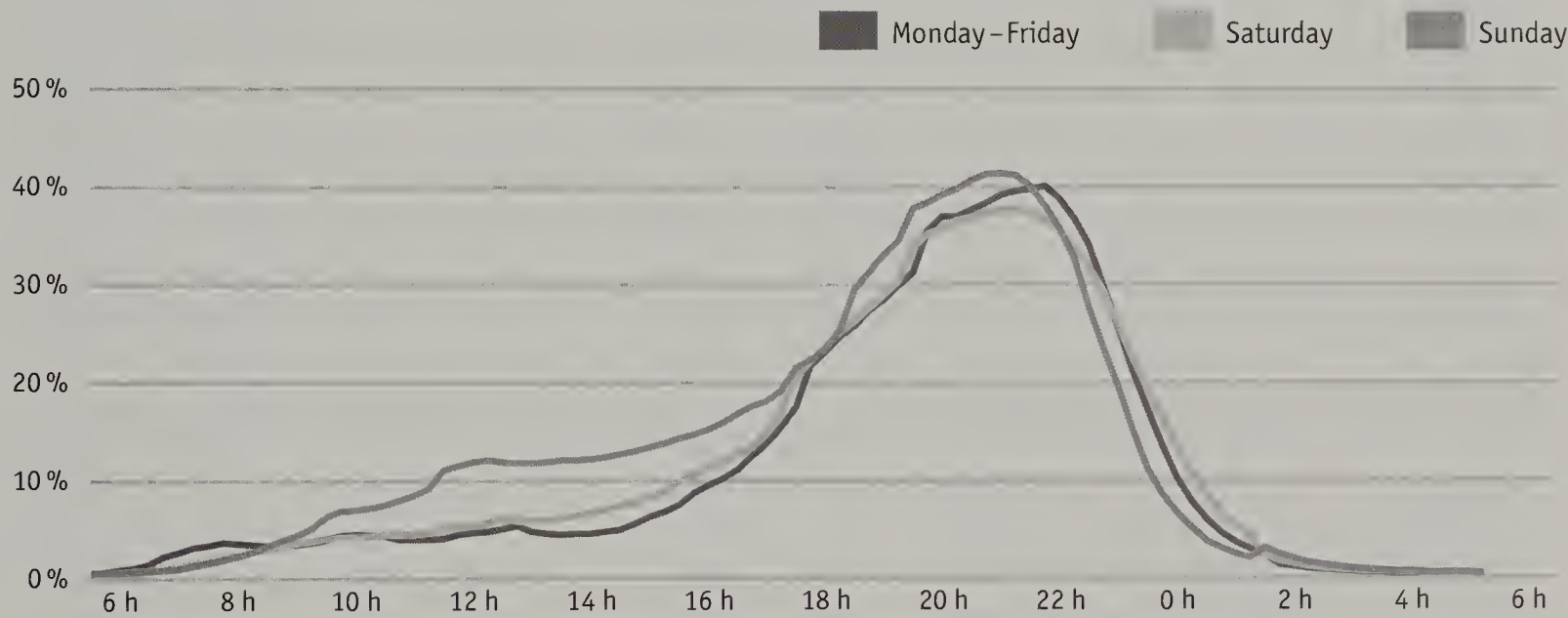
*relaunch, **incl. Canal+, ***+Canal + channels

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	Intomart BV
Panel/Sampling Size	2 800 persons/1 300 households
Instrument used (people-meter, telefon, face-to-face)	AGB 4 900 Intometer
Population size in 000	
Individuals 6+	14 120
Adults 13+	12 846
Main Purchase Responsibles 20–49	4 066
Young Adults 20–34	3 576
Children 6–12	1 274

Source: Intomart

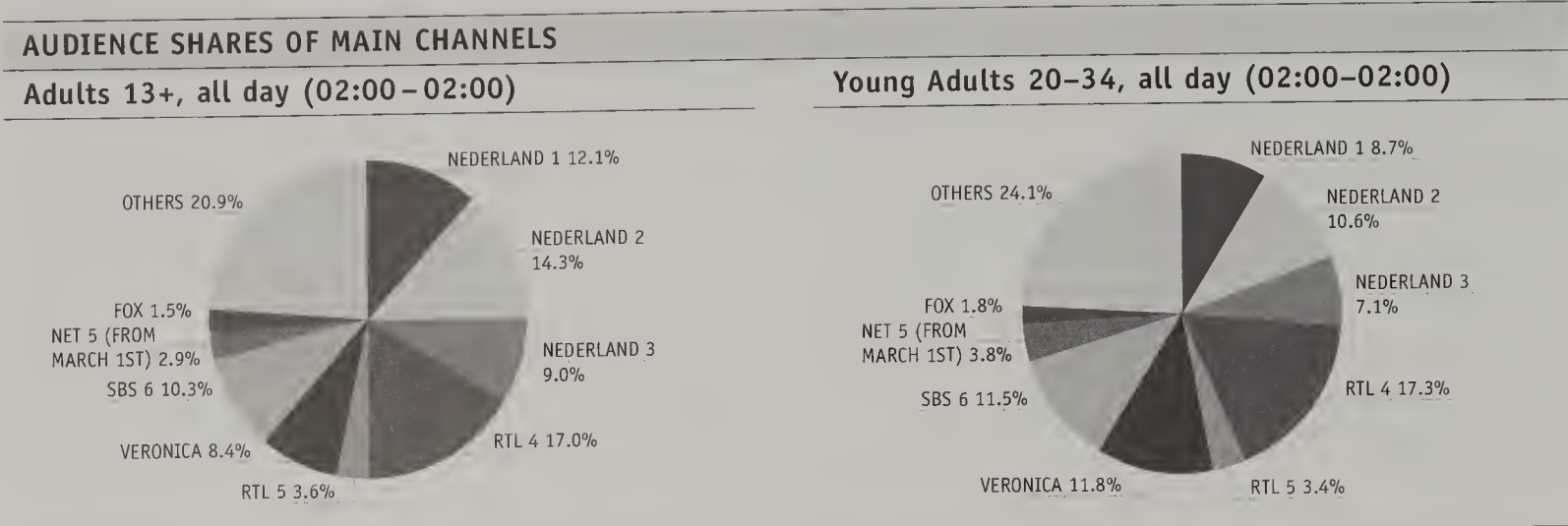
TOTAL TV RATING 1999
Adults Age: 13+



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 13+			Children 6–12			Young Adults 20–34			Main Purchase Responsibles 20–49		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	71.4	73.4	73.1	67.0	67.8	65.8	66.4	69.4	69.6	67.9	71.5	72.0
Viewing time per Individual	157	168	166	97	98	97	138	150	150	148	166	167

Source: Intomart

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00								
	Adults 13+		Young Adults 20–34		Children 6–12		Main Purchase Responsibles 20–49	
	1998	1999	1998	1999	1998	1999	1998	1999
NEDERLAND 1	11.5%	12.1%	9.1%	8.7%	8.3%	8.7%	10.5%	10.5%
NEDERLAND 2	16.7%	14.3%	13.6%	10.6%	8.6%	6.8%	13.5%	10.7%
NEDERLAND 3	9.1%	9.0%	7.4%	7.1%	8.9%	7.9%	8.3%	7.8%
RTL 4	18.7%	17.0%	19.4%	17.3%	15.7%	12.4%	20.5%	19.0%
RTL 5	3.0%	3.6%	3.2%	3.4%	1.3%	1.8%	3.1%	3.9%
VERONICA	8.0%	8.4%	10.1%	11.8%	7.3%	8.6%	9.1%	10.3%
SBS 6	9.7%	10.3%	11.0%	11.5%	8.3%	8.7%	10.2%	10.9%
NET 5*		2.9%		3.8%		2.5%		3.4%
FOX	1.8%	1.5%	1.6%	1.8%	8.2%	9.5%	1.7%	1.6%
KINDERNET	0.3%	0.3%	0.5%	0.5%	7.7%	5.9%	0.5%	0.4%
THE MUSIC FACTORY	1.2%	1.2%	1.8%	2.1%	1.8%	1.6%	1.2%	1.4%
CARTOON NETWORK	0.4%	0.4%	0.5%	0.5%	3.9%	6.2%	0.4%	0.4%
NATIONAL GEOGRAPHIC CH.	0.0%	0.4%	0.0%	0.4%	0.0%	0.3%	0.0%	0.3%
OTHERS	19.8%	18.6%	21.9%	20.6%	20.1%	19.0%	20.9%	19.4%

Source: Intomart

*from march 1st 1999

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 13+		Young Adults 20–34		Children 6–12		Main Purchase Responsibles 20–49	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	7–18 h	18–24 h	7–18 h	18–24 h	7–18 h	18–24 h	7–18 h	18–24 h
NEDERLAND 1	8.3%	13.9%	6.6%	10.0%	8.7%	8.8%	7.9%	12.0%
NEDERLAND 2	16.9%	13.7%	11.6%	10.3%	5.0%	8.8%	12.1%	10.2%
NEDERLAND 3	6.5%	10.1%	5.3%	8.0%	3.2%	13.1%	5.8%	8.8%
RTL 4	20.2%	16.7%	21.6%	16.2%	9.2%	16.2%	25.0%	17.5%
RTL 5	2.9%	3.8%	3.6%	4.1%	1.2%	2.3%	2.9%	4.3%
VERONICA	3.0%	10.6%	3.6%	15.7%	2.1%	15.6%	3.1%	13.6%
SBS 6	8.4%	10.6%	10.2%	12.0%	6.7%	10.9%	9.0%	11.4%
NET 5*	2.4%	3.0%	2.8%	4.2%	1.5%	3.4%	2.3%	3.9%
FOX	1.9%	1.4%	2.0%	1.7%	16.3%	2.3%	1.9%	1.6%
KINDERNET	1.0%	0.0%	1.7%	0.0%	11.4%	0.0%	1.6%	0.0%
THE MUSIC FACTORY	2.4%	0.7%	3.6%	1.3%	2.2%	1.1%	2.3%	1.0%
CARTOON NETWORK	1.0%	0.2%	0.9%	0.4%	8.8%	3.2%	0.9%	0.3%
NATIONAL GEO. CH.	0.5%	0.4%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%
OTHERS	24.6%	14.9%	26.2%	15.8%	23.7%	14.0%	24.9%	15.1%

Source: Intomart

*from march 1st 1999

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)						
Title	Land	Channel	Genre	Start.Time	Date	Audience
BIG BROTHER FINALE	Netherlands	Veronica	Variety Show	21:05	30/12	25.2%
GRAND PRIX EUROV. DE LA CH. 99		TV 2	Variety Show	21:00	29/05	22.2%
DARTS: W. CHMP		SBS 6	Sport	19:00	10/01	21.4%
ORANGE OF THE CENTURY	Netherlands	TV 2	Sport	22:00	21/12	21.3%
WITHOUT A TRACE	Netherlands	NED 1	Magazine	20:52	31/01	20.4%
STUDIO SPORT	Netherlands	TV 2	Sport	19:00	28/11	20.4%
SPEEDSKATING W. CHMP		TV 2	Sport	16:20	07/02	20.2%
FOUR O'CLOCK NEWS		SBS 6	Sport	20:13	14/04	19.8%
JOURNAAL 16.00 UUR	Netherlands	TV 2	News	16:00	07/02	19.0%
FBAL GLASGOW R.-PSV	Netherlands	TV 2	Sport	20:40	20/10	18.9%
STUDIO SPORT		TV 2	Sport	20:14	28/02	18.5%
TV-SHOW ON TRAVEL		TV 2	Talk Show	21:45	21/12	18.4%
BIG BROTHER DISCUSSION	Netherlands	Veronica	Variety Show	22:25	23/12	18.1%
FBAL M.UNITED-B.MUNCHEN	Netherlands	TV 2	Sport	20:04	26/05	18.1%
FBAL NETHERLANDS-ARGENTINA		RTL 5	Sport	20:20	31/03	18.0%
FBAL CHELSEA-FEYENOORD		TV 2	Sport	20:40	24/11	18.0%
EIGHT O'CLOCK NEWS	Netherlands	TV 2	News	20:00	21/03	17.9%
DOMINO DAY	Netherlands	SBS 6	Variety Show	20:55	05/11	17.9%
FBAL ROSENBORG-FEYENOORD	Netherlands	TV 2	Sport	20:40	22/09	17.7%
FBAL FEYENOORD-B.DORTMUND		TV 2	Sport	20:40	14/09	17.7%

TOP 10 MOVIES					
Title	Land	Channel	Start. Time	Date	Audience
BAANTJER (MOVIE)	Netherlands	RTL 4	20:30	01/10	15.6%
TWISTER	USA	SBS 6	20:30	04/10	11.9%
SCHINDLER'S LIST	USA	RTL 4	20:30	03/05	11.5%
NUTTY PROFESSOR	USA	SBS 6	20:30	01/11	10.8%
MISSION IMPOSSIBLE	USA	SBS 6	20:30	06/09	10.7%
JURASSIC PARC	USA	Veronica	20:30	23/02	9.9%
LETHAL WEAPON III	USA	Veronica	21:05	22/01	9.6%
FUGITIVE JUSTICE	USA	RTL 4	20:30	13/01	9.5%
FLODDER IN AMERICA	Netherlands	Veronica	20:30	13/02	9.4%
BACKDRAFT	USA	RTL 4	21:00	04/01	9.3%

TOP 10 SPORT EVENTS					
Title		Channel	Start. Time	Date	Audience
DARTS W.CHMP		SBS 6	19:00	10/01	21.4%
SPEEDSKATING W.CHMP		TV2	16:20	07/02	20.2%
FBAL AJAX-FEYENOORD		SBS 6	20:13	14/04	19.8%
FBAL GLASGOW R.-PSV		TV2	20:40	20/10	18.9%
FBAL M.UNITED-B.MUNCHEN		TV2	20:40	26/05	18.1%
FBAL NETHERLANDS-ARGENTINA		RTL 5	20:20	31/03	18.0%
FBAL CHELSEA-FEYENOORD		TV2	20:40	24/11	18.0%
FBAL ROSENBORG-FEYENOORD		TV2	20:40	22/09	17.7%
FBAL FEYENOORD-B.DORTMUND		TV2	20:40	14/09	17.7%
FBAL BOAVISTA-FEYENOORD		TV2	20:40	29/09	17.5%

Sources: Intomart 1999/13+ Intomart

Top Programmes Channel by Channel

NEDERLAND 1						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
HAPPINESS WAS NORMAL IN THOSE...	Netherlands	Sitcom	39	21:45	30	13.8%
EIGHT O'CLOCK NEWS	Netherlands	News	364	20:00	10	10.4%
GLAMOURLAND	Netherlands	Variety Show	9	22:00	30	9.5%
SONNEVELD SHOW	Netherlands	Comedy Show	7	21:00	50	9.0%
CARS ON THE ROAD	Netherlands	Reality Show	24	21:00	30	8.6%
WITHOUT A TRACE	Netherlands	Reality Show	38	20:55	45	8.4%
THE FEELING OF...	Netherlands	Music	22	21:00	30	7.7%
INSPECTOR MORSE	UK	Series-Crime	21	21:00	100	7.5%
TEN FOR LANGUAGE	Netherlands	Game Show	21	21:30	40	6.9%
DO I HAVE TO PUT WITH THIS TOO	Netherlands	Magazine	40	21.30	45	6.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
JOSTIBAND	Netherlands	Music	15/11	22:00	55	11.0%
NATIONAL DAYS OF COMMEMORATIO	Netherlands	News	04/05	19:50	30	8.4%
ONCE UPON A TIME	USA	Movie	23/01	21:10	156	8.3%
TELEVIZIERRING	Netherlands	Variety Show	08/10	21:00	30	8.1%
ANUAL SERVEY OF DRÖGE	Netherlands	Variety Show	31/12	20:30	50	8.0%
WALKING WITH DINO	n.a.	Movie	22/12	21:00	60	8.0%
REGARDING HENRY	USA	Movie	10/04	20:30	103	7.5%
FELDERHOF MEETS	Netherlands	Talk Show	04/01	20:50	30	7.4%
NATIONAL NEWS QUIZ	Netherlands	Game Show	27/12	21:00	75	7.4%
MEDICINE MAN	USA	Movie	09/01	21:00	100	7.1%

Source: Intomart

TV 2						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
STUDIO SPORT	Netherlands	Sport	51	19:00	60	13.2%
STUDIO SPORT	Netherlands	Sport	34	20:15	40	12.5%
EIGHT O'CLOCK NEWS	Netherlands	News	53	20:00	10	11.6%
SPANGEN	Netherlands	Series-Action	12	20:30	50	9.8%
MISSING	Netherlands	Reality Show	21	22:10	40	9.6%
CANDID CAMERA	Netherlands	Comedy Show	7	20:30	30	9.0%
STUDIO SPORT (foreign FBAL)	Netherlands	Sport	19	22:00	10	8.7%
FBAL EU CUP	Netherlands	Sport	33	22:45	45	8.6%
SIX O'CLOCK NEWS	Netherlands	News	361	18:00	15	7.4%
TV-SHOW	Netherlands	Talk Show	13	21:10	55	7.2%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience
GRAND PRIX EUROVISION DE LA CHANSON 99	Variety Show	29/05	21:00	194	22.2%
ORANGE OF THE CENTURY	Sport	21/12	20:30	36	21.3%
FBAL GLASGOW R.-PSV	Sport	20/10	20:40	105	18.9%
FBAL CHELSEA-FEYENOORD	Sport	24/11	20:40	107	18.0%
FBAL M.UNITED-B.MUNCHEN	Sport	26/05	20:40	106	18.0%
FBAL FEYENOORD-B.DORTMUND	Sport	14/09	20:40	107	17.7%
FBAL ROSENBORG-FEYENOORD	Sport	22/09	20:40	107	17.7%
FBAL B.DORTMUND-FEYENOORD	Sport	27/10	20:40	106	17.4%
FBAL BOAVISTA-FEYENOORD	Sport	29/09	20:40	109	17.4%
FBAL FEYENOORD-O.MARSEILLE	Sport	07/12	20:40	108	17.2%

Source: Intomart

NEDERLAND 3						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
STUDIO SPORT SATURDAY	Netherlands	Sport	51	22:50	50	8.3%
TWO TO TWELVE	Netherlands	Game Show	24	21:20	35	7.1%
NEWS LAAT	Netherlands	News	4	22:30	5	6.9%
SPORTNEWS	Netherlands	Sport	251	22:15	15	6.8%
NAILTIME	Netherlands	Variety Show	11	20:10	45	6.8%
RE-EXAMINATION	Netherlands	Game Show	11	20:10	45	6.6%
TEN O'CLOCK NEWS	Netherlands	News	308	22:00	10	6.5%
BABY-SIT	Netherlands	Sitcom	44	19:40	25	6.3%
A FORTUNE!		Reality Show	60	19:10	25	5.2%
NEIGHBOURS	Netherlands	Documentary	8	20:20	30	5.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
FBAL AJAX-DUKLA BANS		Sport	16/09	20:30	105	14.9%
FBAL AJAX-REAL MALLORCA		Sport	25/11	20:20	110	14.7%
FBAL REAL MALLORCA-AJAX		Sport	09/12	21:44	112	13.2%
FBAL RODA JC-WOLFSBURG		Sport	21/10	20:30	108	13.2%
FBAL HAPOEL HAIFA-AJAX		Sport	21/10	22:33	50	13.1%
FBAL AJAX-HAPOEL HAIFA		Sport	04/11	20:25	109	12.6%
FBAL DUKLA BANS-AJAX		Sport	30/09	20:00	107	12.5%
YOUP VAN'T HEK	Netherlands	Comedy Show	31/12	22:30	35	11.5%
HARRIE JEKKERS	Netherlands	Comedy Show	09/01	19:11	50	10.1%
THE ENTRY OF ST. NICHOLAS	Netherlands	News	13/11	12:00	98	8.8%

Source: Intomart

RTL 4						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
BAANTJER	Netherlands	Series-Action	48	20:30	50	13.7%
GOOD TIMES; BAD TIMES	Netherlands	Ser.-Daily Soap	570	20:00	25	11.9%
10 YEARS ANDRE VAN DUIN	Netherlands	Comedy Show	10	20:40	25	11.8%
SURPRISESHOW	Netherlands	Variety Show	40	20:30	50	10.9%
SUNSHINE AT HOME	Netherlands	Sitcom	52	20:30	25	10.8%
THE CHANCE OF A LIFETIME	Netherlands	Game Show	39	20:30	85	9.9%
CROWBAR	Netherlands	Reality Show	42	20:30	30	9.8%
FAT	UK	Documentary	12	20:30	25	9.6%
WANNA BET	Netherlands	Game Show	24	20:30	85	9.5%
CLASSMATES	Netherlands	Talk Show	18	21:00	50	9.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
BAANTJER (THE MOVIE)	Netherlands	Movie	01/10	20:30	90	15.6%
TINEKE SCHOUTEN	Netherlands	Comedy Show	17/12	20:30	85	15.0%
SOUNDMIXSHOW FINALE	Netherlands	Music	10/10	20:00	85	13.5%
SCHINDLER'S LIST	USA	Movie	03/05	20:30	188	11.5%
FAREWELL OF THE CENTURY	Netherlands	Variety Show	22/12	20:30	85	11.2%
THE BEST OF ANDRE VAN DUIN	Netherlands	Comedy Show	03/01	20:00	45	10.3%
FUGITIVE JUSTICE	USA	Movie	13/01	20:30	90	9.5%
BACKDRAFT	USA	Movie	04/01	21:00	120	9.3%
LOTTERY OF THE CENTURY	Netherlands	Game Show	31/12	22:00	50	9.2%
QUEEN'S BIRTHDAY LOTTERY	Netherlands	Game Show	30/04	21:30	85	9.0%

Source: Intomart

RTL 5						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
COLUMBO	USA	Series–Crime	39	20:30	90	2.2%
DANGER OF LIFE		Reality Show	6	21:50	25	1.9%
REAL MEN		Documentary	12	22:30	25	1.8%
THE SHOP	UK	Docu–Soap	6	21:30	25	1.8%
5 IN THE COUNTRY	Netherlands	News	313	19:00	20	1.7%
CRASH	UK	Reality Show	6	20:30	25	1.7%
TAX HEAVEN	Netherlands	Documentary	16	22:20	25	1.5%
MAYDAY	UK	Reality Show	12	20:50	25	1.5%
PLASTIC FANTASTIC	UK	Documentary	26	22:20	25	1.5%
TOURNEWS	Netherlands	Sport	26	22:50	20	1.5%

Top 10 Single Programmes		Genre	Date	Start.Time	Length (m.)	Audience
FBAL NETHERLANDS–ARGENTINA		Sport	31/03	20:20	107	18.0%
FBAL BRAZIL–NETHERLANDS		Sport	08/06	21:00	110	15.2%
FBAL NETHERLANDS–MAROCCO		Sport	24/04	20:30	108	15.1%
FBAL CRUIJFF TEAM–BARCELONA		Sport	10/03	21:30	110	7.9%
FORMULA 1 CANADA		Sport	13/06	19:00	110	6.7%
FORMULA 1 HUNGARY		Sport	15/08	14:00	110	6.4%
FORMULA 1 EUROPE		Sport	26/09	14:00	110	6.0%
FORMULA 1 FRANCE		Sport	27/06	14:00	110	5.3%
FBAL OLYMPIC TEAM-SPAIN		Sport	30/03	18:50	107	5.1%
FORMULA 1 BELGIUM		Sport	29/08	14:00	110	5.0%

Source: Intomart

VERONICA						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
BIG BROTHER DISCUSSION	Netherlands	Talk Show	45	22:25	50	12.6%
BIG BROTHER	Netherlands	Docu–Soap	175	19:00	25	9.3%
SCHIPHOL AIRPORT	Netherlands	Docu–Soap	40	21:35	30	7.4%
BIG BROTHER COMPILATION	Netherlands	Docu–Soap	47	18:00	50	7.3%
SAM SAM	Netherlands	Sitcom	26	20:30	25	6.5%
FLODDER	Netherlands	Sitcom	22	20:30	25	6.3%
WHEELCLAMP & CO.	Netherlands	Docu–Soap	19	22:20	25	6.3%
GLAD I'M DRIVING	Netherlands	Reality–Show	24	21:00	25	5.8%
THE RAINCOAT	Netherlands	Sport	44	21:00	25	5.5%
IN THE FLEMISH POT	Netherlands	Sitcom	48	20:30	25	5.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
BIG BROTHER FINALE	Netherlands	Variety Show	30/12	21:00	180	25.2%
FBAL NETHERLANDS–BRAZIL		Sport	09/10	20:10	108	16.4%
FBAL PORTUGAL–NETHERLANDS		Sport	10/02	20:25	107	16.4%
FBAL NETHERLANDS–BELGIUM		Sport	04/09	20:20	110	15.7%
FBAL DENMARK–NETHERLANDS		Sport	18/08	18:45	106	13.7%
FBAL BRAZIL–NETHERLANDS		Sport	05/06	20:45	108	12.2%
JURRASIC PARK	USA	Movie	23/02	20:30	115	9.9%
LETHAL WEAPON	USA	Movie	22/01	21:05	103	9.6%
FLODDER IN AMERIKA	Netherlands	Movie	13/02	20:30	112	9.4%
VOLCANO	USA	Movie	07/02	21:00	85	9.1%

Source: Intomart

SBS 6						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
DARTS W.CHMP		Sport	16	20:00	25	11.3%
ALL YOU NEED IS LOVE	Netherlands	Variety Show	36	20:30	50	7.6%
HART OF THE NETHERLANDS	Netherlands	Magazine	336	22:30	30	5.6%
CRIMEREPORTER P. R. DE VRIES	Netherlands	Magazine	116	21:30	50	5.4%
WEEKEND CALL	Netherlands	Magazine	10	22:30	5	5.3%
HART IN ACTION	Netherlands	Magazine	44	21:30	25	5.2%
WEEKEND MILJONAIR		Game Show	75	20:30	40	4.7%
PRIME TIME MAGAZINE		Magazine	8	22:00	25	4.6%
JAG	USA	Series-Action	111	21:00	45	4.5%
LOVEBOAT AMORINA	Netherlands	Variety Show	21	20:30	60	4.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
FBAL AJAX-FEYENOORD		Sport	14/04	20:13	107	19.8%
FBAL AJAX-BARCELONA		Sport	06/04	20:30	108	14.8%
FBAL AJAX-FORTUNA		Sport	13/05	18:00	108	14.4%
ALL YOU NEED IS LOVE CHRISTMAS	Netherlands	Variety Show	24/12	20:30	120	12.5%
TWISTER	USA	Movie	04/10	20:30	105	11.9%
FBAL FEYENOORD-VITESSE		Sport	10/03	20:00	115	10.8%
FBAL RODA JC-AJAX		Sport	04/02	20:30	106	10.8%
NUTTY PROFESSOR	USA	Movie	01/11	20:30	95	10.8%
FBAL PSV-FORTUNA		Sport	13/04	20:00	108	10.7%
MISSION IMPOSSIBLE	USA	Movie	06/09	20:30	107	10.7%

Source: Intomart

NET 5						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
24 HOUR AMBULANCE		Reality Show	6	20:30	25	2.4%
TENNIS WIMBLEDON	UK	Sport	98	20:30	420	1.8%
A-TEAM	USA	Series-Action	219	20:30	25	1.4%
24 UUR ZIEKENHUIS		Reality Show	44	20:30	25	1.4%
FAWLTY TOWERS	UK	Sitcom	26	20:30	25	1.2%
LIFE OF GRIME		Documentary	10	20:30	25	1.2%
LORD OF DANCE		Music	10	20:30	45	1.2%
JAG	USA	Series-Action	33	20:30	45	1.1%
ANGELS OF THE CITY		Documentary	12	20:30	25	1.1%
LAGOS AIRPORT		Docu-Soap	12	20:30	25	1.1%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
DOMINO DAY	Netherlands	Variety Show	05/11	21:00	85	17.9%
FIRST WIVES CLUB	USA	Movie	11/11	20:30	83	4.9%
TRUE LIES	USA	Movie	02/10	22:00	115	4.8%
MATILDA	USA	Movie	13/12	20:30	80	4.4%
DIE HARD	USA	Movie	30/10	22:00	124	4.4%
TOTAL RECALL	USA	Movie	11/12	22:00	105	4.1%
LEGENDS OF THE FALL	USA	Movie	07/03	20:30	115	3.8%
AMERICAN PRESIDENT	USA	Movie	14/11	20:30	120	3.7%
NINE MONTHS	USA	Movie	04/11	20:30	90	3.7%
FBAL M. UNITED-NEWCASTLE		Sport	22/05	16:00	105	3.6%

Source: Intomart

FOX 8						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
ABOVE 18	n.a.	Magazine	81	23:30	25	1.8%
TOTO DIVISION		Sport	82	20:00	120	1.4%
GOLDCOAST	Netherlands	Ser.–Daily Soap	212	19:00	25	1.1%
SEINFELD	USA	Sitcom	50	22:30	25	0.8%
BRUCE BROTHER	n.a.	Series–Family	30	20:25	45	0.8%
WEEKENDER	n.a.	Series–Family	21	22:30	45	0.8%
DAWSONS CREEK	n.a.	Series–Family	114	19:00	25	0.7%
RED LIGHT GIRLS	n.a.	Variety Show	25	22:30	45	0.7%
BASIC INSTINCT	USA	Series	16	22:30	45	0.7%
MASH	USA	Series–General	459	20:00	25	0.6%

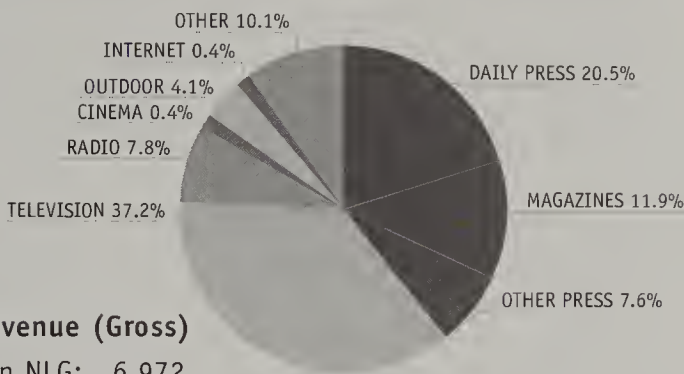
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
INDEPENDENCE DAY	USA	Movie	16/11	20:30	120	7.5%
FBAL M.UNITED–WORLD TEAM		Sport	11/10	21:00	109	2.3%
BRAVEHEART	USA	Movie	11/12	22:00	90	1.9%
ALIENS	USA	Movie	13/11	22:00	95	1.9%
HOME ALONE	USA	Movie	26/10	20:30	102	1.8%
PAMELA PRINCIPLE	USA	Movie	20/11	22:10	98	1.7%
ROSWELL INCIDENT	USA	Documentary	16/11	23:05	60	1.6%
ANIMAL INSTINCTS	USA	Movie	30/10	22:00	60	1.4%
BUFFY THE VAMPIRE	USA	Movie	28/08	21:55	80	1.4%
PLANET APES	USA	Movie	23/01	22:15	105	1.4%

Source: Intomart

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million NLG)	6 972
Total adspend	(in million USD)	3 183
Total adspend	(in million EUR)	3 169
TV adspend	(in million NLG)	2 592
TV adspend	(in million USD)	1 183
TV adspend	(in million EUR)	1 178
TV adspend	in % of GDP	0.32
TV adspend	per capita (USD)	75.1

SHARE OF MEDIA EXPENDITURE		GROSS
Category: Market Share in %		



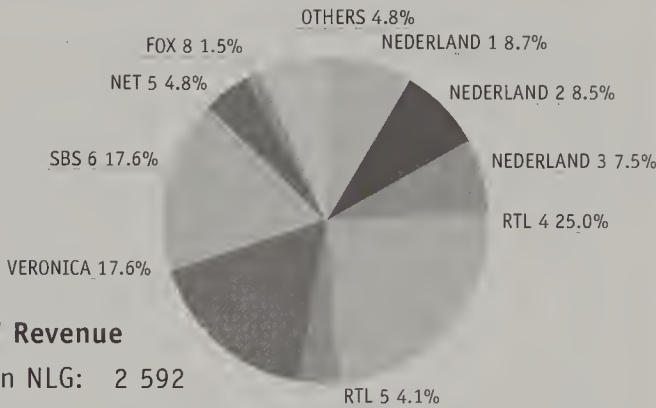
Total Revenue (Gross)
in million NLG: 6 972
in million EUR: 3 169

Source: BBC

TV ADVERTISING STATISTICS	
Total number of spots broadcast	693 687
Average spot length (in sec.)	29.0
Total number of advertisers	1 771
Number of TV advertisers	760
Total number of advertised products	1 924 832
Number products advertised on TV	636 088

Source: BBC (Gross figures)

SHARE OF TV ADVERTISING REVENUE	
Channels: Advertising Market Share in %	



Total TV Revenue
in million NLG: 2 592
in million EUR: 1 178

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	Total advertising	Television	Spent in TV	Share of TV Expenditure
FOOD	643	479	74.5%	18.5%
PERSONAL CARE	477	362	76.0%	14.0%
STIMULANTS	441	278	63.1%	10.7%
TELECOM/ICT COMPANIES	669	201	30.0%	7.8%
DETERGENTS	212	192	90.5%	7.4%
RETAIL	1 276	157	12.3%	6.0%
MEDIA	439	152	34.6%	5.9%
FINANCIAL INSTITUTIONS	513	148	28.7%	5.7%
TRANSPORT	379	129	33.9%	5.0%
HORECA, TOURISM AND RECREATIE	325	104	32.0%	4.0%
OTHERS	1 598	392	24.5%	15.1%
TV Advertisers				
PROCTER & GAMBLE NEDERLAND	150.8	145.6	96.6%	5.6%
LEVER FABERGE NEDERLAND	148.5	127.4	85.8%	4.9%
L'OREAL NEDERLAND	95.1	82.1	86.3%	3.2%
KPN TELECOM	176.2	67.7	38.4%	2.6%
VAN DEN BERGH NEDERLAND	79.1	65.8	83.2%	2.5%
HEINEKEN NEDERLAND	80.1	56.6	70.6%	2.2%
MARS	58.0	54.3	93.7%	2.1%
HENKEL SCHWARZKOPF	60.0	52.3	87.2%	2.0%
COCA COLA BEVERAGES	57.6	47.8	83.1%	1.8%
DOUWE EGBERTS	49.1	43.5	88.6%	1.7%
OTHERS	6.017.7	1.876	31.2%	72.4%
Total (in million NLG)	6 972.2	2 592.3	37.2%	100.0%
Total (in million EUR)	3 169.0	1 176.0	37.2%	100.0%

Source: BBC

Norway

The Norwegian television market consists of five national channels, NRK1, NRK2, TV 2, TVNorge and TV3, about twenty regional channels, and two providers of pay-TV.

NRK is a state owned company and both NRK1 and NRK2 are licence fee funded channels with public service obligations. NRK was established in 1933, and the television service was established in 1960. The first advertisement funded channel in Norway was TV 3 which began broadcasting in 1987. TV3 Norway is privately owned and part of the pan-Scandinavian multi-channel operation. Up to 1989, TV3 was one channel transmitting to Norway, Denmark and Sweden. It was then split in to three different channels, TV3 Norway, TV3 Denmark and TV3 Sweden, each with different programme output. In 1988, the second advertisement funded, privately owned channel, TVNorge was established. TVNorge originated as a local television channel but has developed to a national channel distributed by cable and satellite. In 1992, TV 2 started broadcasting. This is an advertisement funded privately owned channel operating on a licence agreement.

In 1997, TV2 and its proprietors began buying into TVNorge and became the second largest shareholder owning 49.3 % of the shares, while Scandinavian Broadcasting Systems (SBS) held 50.7%. TVNorge and TV 2 signed a co-operation agreement where TV 2 became responsible for the programming and strategy of TVNorge and in return TV 2 guaranteed TVNorge a certain GRP production on an annual and accumulated level. This strategy was unsuccessful, and in October 1999 TV 2 bought the company out of the agreement for 335 million NOK and 30 million NOK in free advertising time, according to the annual report for 1999. TV 2 retains its shareholdings, but responsibility for programming has been transferred back to TVNorge. In terms of audience market share, NRK1 and TV 2 are the dominant channels. In addition to these five national channels, two new channels have also been recently established. In September 1999, Metropol, a new local channel, started broadcasting in Oslo on the basis of a concession from the Mass Media Authority granting an exclusive right to operate terrestrial distributed local television in Oslo. Metropol is branded as „urban television“ and is does not broadcast any news, sports or children programming, aiming to reach young, urban viewers. In addition to distribution in Oslo, Metropol is also distributed to other big cities in Norway through cable and satellite. In May 2000, Metropol had a technical distribution of 40% of the households in Norway. In March 2000, Viasat launched Viasat plus. Viasat plus is funded by advertising and distributed by satellite and cable. In March, Viasat plus had a technical penetration of 49% of the population. The target group for Viasat plus is the age group 3–35 and the programme output consists of movies, sitcoms., children’s programming and sport. Viasat is owned by Swedish Modern Times Group, which also owns TV3.

Canal Digital and Viasat are the main providers of Pay TV. Canal Digital started digital transmissions in 1998, while Viasat began their digital transmissions in April 2000. In

March 2000, there were 50 000 digital parabola sets in Norway. While Canal Digital transmits NRK1, NRK2, TV 2 and TVNorge digitally, Viasat transmits TV3. Thus all the national channels are transmitted digitally, but none of them have started digital transmitting themselves.

In June 1999, a Government White Paper proposed that two digital terrestrial distribution networks should be established. The main argument for a terrestrial distribution net is that this is the best way to secure the whole population access to relatively inexpensive services based on Norwegian reality and culture. The White Paper proposes that no state funding should be available, so the question of funding is not solved.

New trends in programming

In 1999 a new trend in programming, focusing on reality-TV and adventure, appeared on TV3 and TVNorge. TV3’s Expedition Robinson is a Norwegian version of a format developed by British Planet 24, which has enjoyed huge success in Sweden. In the programme, 16 people are placed on a deserted island and have to build their own house and infrastructure. The contestants must themselves decide who they will exclude. After 47 days, the last contestant wins 250.000 NOK. In 71° North, 10 contestants have to travel through Norway from south to north (2500 km.) in 16 days. They compete with each other in different tests, and as in Expedition Robinson they must exclude other contestants. 71° North is a Norwegian format developed by the independent production company Nordisk Film & TV. Currently TVNorge is planning to send a Norwegian version of Big Brother in 2001.

Changes in audience measurement

From 01.01.2000, Norsk Gallup Institutt became responsible for the TV-meter and the TV audience measurement. They have doubled the amount of households in the panel from 500 to 1000 and measure viewing on all the television sets in a household, whereas MMI (who previously did the audience measurement) only measured viewing on one television set per household. In a test period in December 1999, both MMI and Norsk Gallup measured viewing. The figures from Norsk Gallup show a 29% higher viewing time among 12–19 years and 10% less viewing time among people over 60 years.

Norway

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General Data

COUNTRY	
Land area (km ²)	323 877
Total population	4 445 329
Number of households	2 000 000 ¹
Average household size	2.2
In % of households equipped	
Phone	95.0
Mobile telephone subscribers	64.0 ²
PC's	67.0
Internet access	35.0 ³
Internet user, last month	36.0 ³

Date of the data: ¹estimation from '97, ²March 2000 population 1.1.99, ³November '99

ECONOMICS	
GDP in billion NOK (at current prices)	1 189.3
GDP per capita in NOK (at current prices)	266 549
Inflation rate in 1999 (in %)	2.3
Value of NOK in Euro (EUR)	1 EUR = 8.062 NOK
Value of NOK in US-Dollar (USD)	1 USD = 7.990 NOK

Sources: Statistics Norway, Telenor, Norsk Gallup Instistutt, Central Bank of Norway

TV OVERVIEW	
Total number of TV households (TVHH)	1 827 000
In % of all households	91.0
Numbers of channels received by 70% of the population	4
TV License-Fee cost per year	NOK 1 590.–/EUR 194.2

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.0
Multiset (homes with more than 1 TV set)	35.0 ¹
VCR	77.0
Teletext	86.0
Remote control	n.a.

Sources: MMI, Statistics Norway, NRK, Elektronikkbransjens Servicekontor, ¹in 1998
²Statistical Yearbook 2000, European Audiovisual Observatory

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	47.4 ²
	connected	39.0
Satellite	private dish/DTH	22.0
	collective dish/SMATV	5.0
Terrestrial	analog	52.0
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	16%	Digital TV subscribers	50 000

Sources: Statistics Norway, Canal Digital

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
NRK 1	1960	T	100%	Norwegian	93	Generalist	L–F, Spon.	n.a.
NRK 2	1996	T	77%	Norwegian	42	Generalist	L–F, Spon.	n.a.

Source: NRK Research

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TV 2	1992	T	96%	Norwegian	115	Generalist	Adv.	In-house
TV Norge	1988	C, S	82%	Norwegian	n.a.	Generalist	Adv.	In-house
TV3	1987	C, S	61%	Norwegian	150	Generalist	Adv.	In-house

Sources: TV 2 Information department, TV 3 Research and TV Norge Research

DOMESTIC CHANNELS (REGIONAL PRIVATE)

Channels	Diffusion	Tech. Pen.	Language	h/week	Programming	Revenue	Sales House
Metropol	T, C	40%	Norwegian	56	Generalist	Adv.	In-house, TVNet+sal
Asker*	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Aust-Agder	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Buskerud	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Finnmark	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Follo	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Hålogaland	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Haugaland	T, C	n.a.	Norwegian	9.3	Generalist	Adv.	In-house, TVNet+sal
TV Hordaland	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Innlandet	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Nord-Trønd.	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Nordvest	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Østfold	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Ringerike	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Sunnmøre	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Telemark	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Tromsø	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Trøndelag	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Vest	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV Vestfold	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TV-Sør	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TVHelgeland	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
TVRomerike	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal
VestTele.Lok.-TV	T, C	n.a.	Norwegian	6.3	Generalist	Adv.	In-house, TVNet+sal

Source: The Mass Media Authority. These regional private channels are based on concessions handed out in 1996 by the Mass Media Authorities. *og Bærum Lokal-TV

INTERNATIONAL/PAN EUROPEAN CHANNELS

Channels	Diffusion	Tech. Pen.	Language	Programming	Revenue
EUROSPORT	C, S	86%	Norwegian and Swedish	Sport	Adv.
DISCOVERY CHANNEL	C, S	41%	English/sub. Norwegian	Documentaries	Adv.
ANIMAL PLANET	C, S	n.a.	English	Documentaries	Adv.
BBC WORLD	C, S	63%	English	News	Adv.
FOX KIDS	C, S	n.a.	Norwegian	Children	Adv.
MTV EUROPE	C, S	50%	English	Music	Adv.
VH1	C, S	n.a.	English	Music	Adv.
CARTOON NETWORK	C, S	30%	Danish, Swedish and English	Children	Sub.
NICKELODEON	C, S	n.a.	Norwegian, Swedish and Danish	Children	Sub.
CNBC EUROPE	C, S	22%	English	Financial News	Adv.
TRAVEL CHANNEL	C, S	n.a.	English/sub. Norwegian	Travel	Adv.
BBC PRIME	C, S	25%	English	General	Sub.
HALLMARK	C, S	n.a.	English/ sub. Norwegian	Movies, Mini series	Sub.
3 SAT	C, S	n.a.	German	Art and culture	L-F
TNT CLASSIC MOVIES	C, S	n.a.	English/sub. Swedish and Danish	Movies	Adv.

OTHER FOREIGN CHANNELS

Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
STV 1	Public	C	n.a.	Swedish	Generalist	L-F
STV 2	Public	C	n.a.	Swedish	Generalist	L-F

PAY TV (ANALOG)								
Channels	Launch	Diffussion	Language	h/week	Programming	Cost/month	Revenue	
CANAL+	1997	C, S	English/sub. Norw.	168	Movies, Sport	NOK 199,00	Sub.	
CANAL+ YELLOW	1997	C, S	English/sub. Norw.	140	Movies, Sport	Incl. in Canal+	Sub.	
TV1000	1989	C, S	English/sub. Norw.	168	Movies, Sport	NOK 189,00	Sub.	
CINEMA	1995	C, S	English/sub. Norw.	168	Movies	Incl. in TV1000	Sub.	

Sources: Canal Digital, Viasat

DIGITAL PACKAGES								
Channels	Launch	Diff.	Decoder	Subscr.	Language	No.of ch.	Revenue	Cost/month
CANAL DIGITAL	1997	C, S	NOKIA*	50 000	English/sub. Norwegian	78	Sub.	NOK 199.00

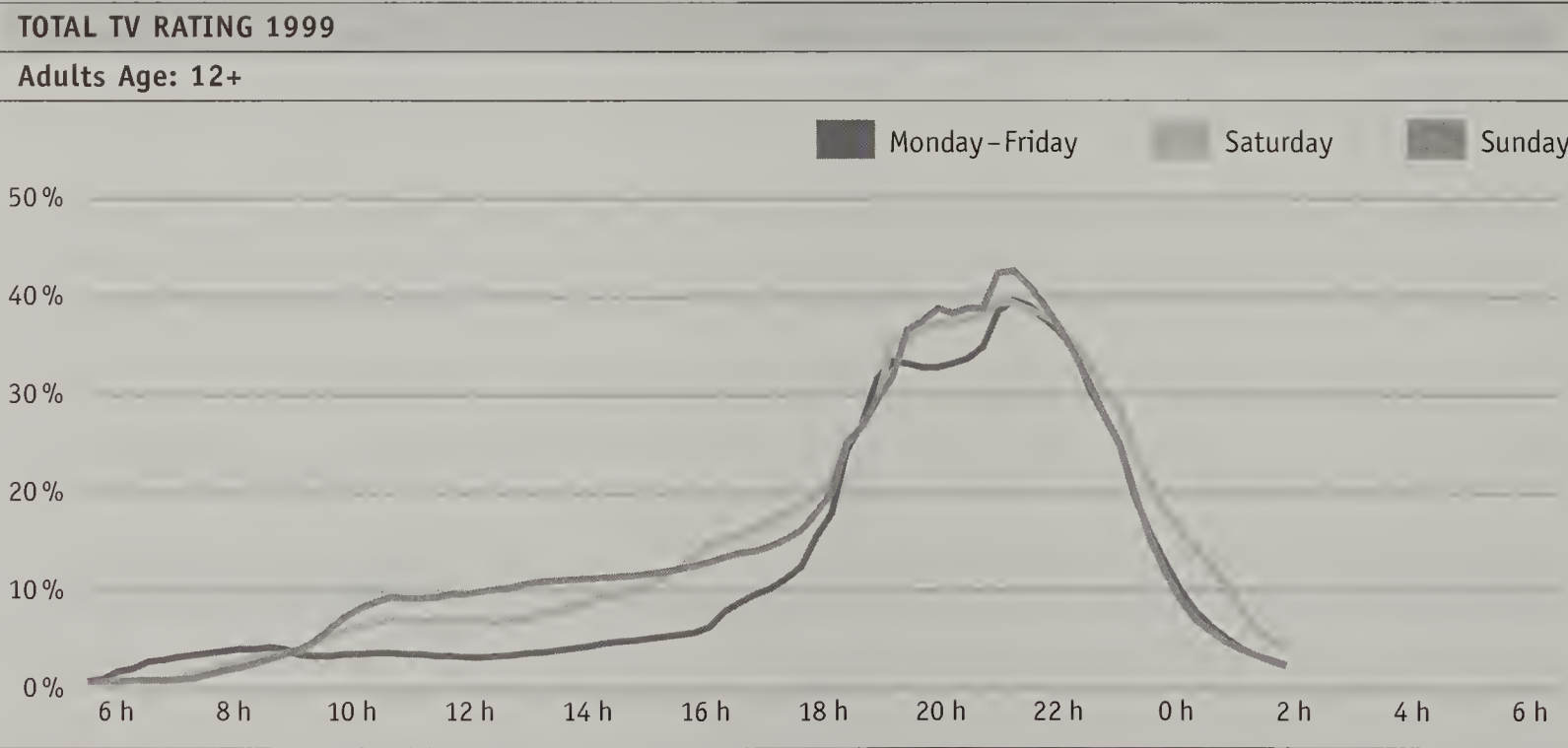
Source: Canal Digital

*9310S E15 and others

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	Norsk TV-Meterpanel/Markeds- og mediainstituttet (MMI)
Panel/Sampling Size	500 households, 1 107 individuals (12+)
Instrument used (people-meter, telefon, face-to-face)	People-meter
	Population size in 000
Individuals 3+	4 237
Adults 12+	3 703
Housewives 18–49	986
Young Adults 12 – 49	2 324
Children 3–11	534

Sources: MMI/TV-meterpanelet

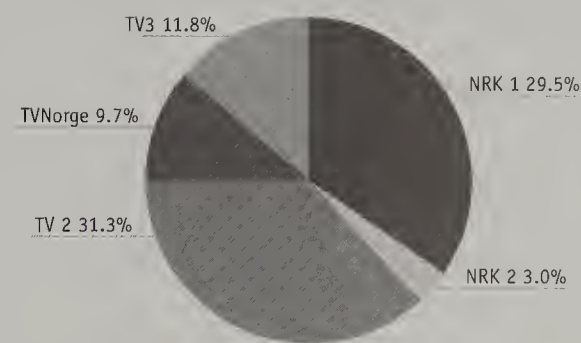
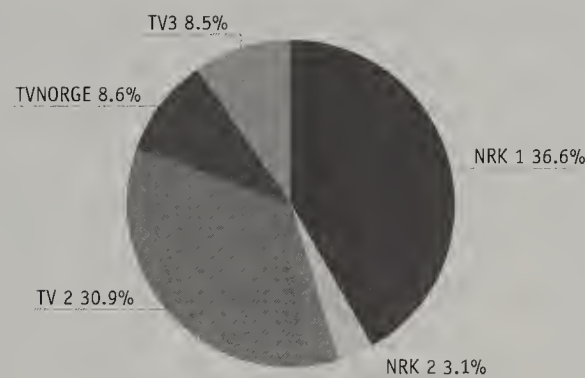


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 12+			Children 3–11			Young Adults 12–49			Housewives 18–49		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	71.0	71.0	69.0	n.a.	n.a.	59.0	n.a.	n.a.	59.0	n.a.	n.a.	61.0
Viewing time per Viewer	203	213	214	n.a.	n.a.	127	n.a.	n.a.	n.a.	n.a.	n.a.	199
Viewing time per Individual	144	151	149	n.a.	n.a.	78	n.a.	n.a.	115	n.a.	n.a.	123

Source: MMI/TV-meterpanelet

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS	
Adults 12+, all day (02:00–02:00)	Young Adults 12–49, all day (02:00–02:00)



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00								
	Adults 12+		Young Adults 12–49		Children 3–11		Housewives 18–49	
	1998	1999	1998	1999	1998	1999	1998	1999
NRK 1	38.4%	36.6%	n.a.	29.5%	n.a.	35.9%	n.a.	30.2%
NRK 2	2.6%	3.1%	n.a.	3.0%	n.a.	1.1%	n.a.	2.6%
TV 2	30.2%	30.9%	n.a.	31.3%	n.a.	25.4%	n.a.	33.0%
TVNorge	8.6%	8.6%	n.a.	9.7%	n.a.	6.7%	n.a.	9.4%
TV3	7.0%	8.5%	n.a.	11.8%	n.a.	13.8%	n.a.	11.3%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 12+		Young Adults 12–49		Children 3–11		Housewives 18–49	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6–19 h	19–23 h	6–19 h	19–23 h	6–19 h	19–23 h	6–19 h	19–23 h
NRK 1	32.3%	41.1%	27.9%	32.1%	39.8%	29.0%	27.0%	33.5%
NRK 2	1.6%	3.7%	1.8%	3.4%	0.5%	1.9%	1.5%	3.0%
TV 2	34.5%	30.4%	31.1%	32.5%	17.1%	39.2%	35.1%	33.2%
TVNorge	8.1%	8.3%	9.4%	9.6%	5.1%	9.3%	8.5%	9.6%
TV3	7.8%	7.7%	11.1%	11.5%	15.4%	11.1%	11.2%	10.5%

Sources: NRK Research, TV 2 Research, TV Norge Research, TV 3 Research, MMI/TV-meterpanelet

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
GRAND PRIX EUROV. DE LA CHAN. 99	Norway	NRK 1	Variety Show	21:00	29/05	38.6%	83.2%
GRAND PRIX (NATIONAL CONTEST)		NRK 1	Variety Show	21:00	27/02	36.0%	76.6%
THE NEWS	Norway	TV 2	News	21:00	05/04	34.2%	69.3%
HBAL W. CHMP NORWAY–FRANCE	Norway	TV 2	Sport	17:49	12/12	34.1%	76.0%
THE NEWS		TV 2	News	18:38	12/12	32.9%	73.7%
NEWS ON SATURDAY	Norway	NRK 1	News	19:30	06/03	31.7%	75.3%
W. CHMP-STUDIO IN RAMSAU	Norway	NRK 1	Sport	20:15	27/02	31.5%	68.1%
SPORTSXTRA	Norway	TV 2	Sport	20:10	12/12	30.5%	61.0%
NEWS ON SATURDAY	Norway	NRK 1	News	19:30	30/01	31.0%	75.1%
NEWS ON SATURDAY	Norway	NRK 1	News	19:30	09/01	30.8%	72.3%
NEWS ON SATURDAY	Norway	NRK 1	News	19:30	23/01	30.5%	70.6%
KLM	Norway	NRK 1	Comedy Show	20:00	02/01	30.3%	70.4%
FBAL CUP FINALE BRANN–ROSENB.	Norway	TV 2	Sport	15:55	30/10	30.2%	83.0%
WEATHER FORCAST		TV 2	News	21:36	05/04	29.0%	61.2%
LOTTERY	Norway	NRK 1	News	20:14	06/03	29.6%	65.5%
HØYT SKATTET	Norway	NRK 1	Series–Family	20:24	27/11	29.5%	67.5%
HØYT SKATTET	Norway	NRK 1	Series–Family	20:25	04/12	29.4%	66.4%
DEAR, DEAR ALFRED	Norway	TV 2	Variety Show	21:44	05/04	29.1%	63.2%
NEWS ON SUNDAY	Norway	NRK 1	News	19:30	31/01	29.0%	68.4%
HBAL W. CHMP NORWAY–AUSTRIA		TV 2	Sport	19:00	11/12	28.9%	63.0%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
MRS. DOUBTFIRE	USA	TV 2	21:38	28/03	16.2%	49.8%
ROLLEBYTTET	n.a.	TV 2	21:38	04/04	15.4%	41.6%
NÅ ER DET JUL IGJEN	n.a.	TV 2	21:37	19/12	14.4%	41.2%
DEN DEMOKRATISKE TERRORISTEN	Swedish	NRK 1	21:40	13/04	14.1%	41.3%
A FISH CALLED WANDA	USA	NRK 1	21:41	12/10	13.8%	41.7%
TOP GUN	USA	TV 2	21:34	25/04	13.5%	40.5%
BABY BOOM	USA	TV 2	21:35	23/05	13.1%	42.9%
BRUDENS FAR II	USA	TV 2	21:37	14/03	13.0%	40.7%
GRUMPY, OLD MEN	USA	NRK 1	21:41	09/11	12.9%	40.9%
GRUMPY, OLD MEN II	USA	NRK 1	21:40	30/11	12.9%	39.9%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
HBAL W.CHMP NORWAY–FRANCE		TV 2	17:49	12/12	34.1%	76.0%
FBAL CUP FINALE BRANN–ROSENBORG		TV 2	16:55	30/10	30.2%	83.0%
HBAL W. CHMP NORWAY–AUSTRIA		TV 2	19:00	11/12	28.8%	63.0%
FBAL NORWAY–ITALY		TV 2	20:40	10/02	26.1%	59.0%
HBAL W. CHMP NORWAY–HUNGARY		TV 2	19:02	09/12	25.2%	62.0%
SKI W. CHMP JUMP		NRK 1	21:51	27/02	23.8%	55.1%
ATHLETICS W. CHMP		NRK 1	19:39	29/05	23.5%	65.4%
FBAL NORWAY–GEORGIA		TV 2	20:18	30/05	22.9%	61.0%
FBAL MOLDE–ROSENBORG		NRK 1	21:00	25/05	22.8%	56.9%
HBAL W. CHMP NORWAY–UKRAINE		TV 2	19:01	07/12	22.5%	54.0%

Sources: NRK Research, TV 2 Research

Top Programmes Channel by Channel

NRK 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
DERRICK	Germany	Series–Crime	6	21:07	58	21.2%	47.6%
NUMBER 13	Norway	Sitcom	5	19:55	27	20.1%	50.7%
‘ALLO, ‘ALLO!	UK	Comedy Show	20	20:13	27	16.9%	53.6%
DARLING BUDS OF MAY	UK	Series–Family	18	21:28	50	16.0%	41.7%
FANNY AND ALEXANDER	Sweden	Series–General	4	21:11	76	11.1%	30.6%
MATADOR	Denmark	Series–General	28	20:14	49	10.6%	35.7%
VESTAVIND	Norway	Series–General	17	20:14	50	10.2%	29.4%
OFFSHORE	Norway	Series–General	45	21:42	29	9.4%	29.8%
VANITY FAIR	UK	Series–General	6	21:46	51	6.4%	21.1%
BIG SKY	Australia	Series–General	17	23:25	44	6.3%	37.4%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GRAND PRIX EURO. DE LA CHAN. 99		Variety Show	29/05	21:00	193	38.6%	83.2%
GRAND PRIX (NATIONAL CONTEST)	Norway	Variety Show	27/02	21:00	100	36.0%	76.6%
NEWS ON SATURDAY	Norway	News	06/03	19:30	44	31.7%	75.3%
W. CHMP IN RAMSAU	Norway	Sport	27/02	20:15	44	31.5%	68.1%
NEWS ON SATURDAY	Norway	News	30/01	19:30	17	31.0%	75.1%
NEWS ON SATURDAY	Norway	News	09/01	19:30	15	30.8%	72.3%
NEWS ON SATURDAY	Norway	News	23/01	19:30	15	30.5%	70.6%
NEWS	Norway	News	01/01	19:30	30	30.1%	70.5%
LOTTERY	Norway	News	06/03	20:14	6	29.1%	65.5%
NEWS ON SUNDAY	Norway	News	31/01	19:30	46	29.0%	68.4%

Source: NRK Research

NRK 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE UNINVITED	UK	Series–Crime	4	22:20	50	2.3%	8.7%
THE PRACTISE	USA	Series–Crime	11	20:00	42	1.0%	3.0%
THE COMMISH	USA	Series–Crime	4	23:10	46	1.0%	6.9%
ROUGE ET NOIR	France	Series–General	7	21:05	50	0.9%	2.9%
BUGS	UK	Series–Crime	10	23:10	48	0.9%	6.0%
NORTH AND SOUTH	USA	Series–General	24	20:40	46	0.9%	3.0%
RELATIVITY	USA	Series–General	13	20:00	43	0.9%	2.3%
DARK SKIES	USA	Series–General	20	22:45	45	0.8%	2.9%
SECRET LIFE OF MEN	USA	Sitcom	10	19:40	20	0.7%	1.9%
VERONICA’S CLOSET	USA	Sitcom	13	19:35	21	0.7%	2.0%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CHELSEA–MAN. UNITED		Sport	10/03	20:40	100	7.6%	24.3%
FBAL W. CHMP NORWAY–BRAZIL		Sport	10/07	19:10	123	6.8%	35.8%
NORWAY TODAY	Norway	News	17/08	22:10	18	6.5%	12.6%
NORWAY TODAY	Norway	News	28/04	22:10	18	6.5%	15.6%
FBAL LAZIO–MANCHESTER UNITED		Sport	27/08	20:30	130	6.3%	43.5%
NORWAY TODAY	Norway	News	19/01	22:10	18	6.2%	12.8%
FBAL THE ROAD TO WEMBLEY		Sport	04/01	20:55	117	5.7%	36.5%
NORWAY TODAY	Norway	News	26/01	22:10	18	5.6%	11.3%
NORWAY TODAY	Norway	News	05/01	22:10	18	5.6%	14.9%
FBAL MAN. UNITED–WORLD TEAM		Sport	11/10	20:55	110	5.5%	29.6%

Source: NRK Research

TV 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ALLY MCBEAL	USA	Series-General	15	21:45	46	13.3%	35.0%
SAMSØ	Denmark	Series-Crime	n.a.	n.a.	n.a.	12.4%	36.2%
KARL & CO	Norway	Sitcom	n.a.	n.a.	n.a.	11.6%	32.0%
BECK	Sweden	Series-Crime	n.a.	21:45	n.a.	11.3%	32.7%
MORD OG MYSTERIER		Series-Crime	n.a.	21:45	44	9.7%	27.1%
HOTEL CAESAR	Norway	Ser.-Daily soap	n.a.	19:30	n.a.	9.6%	35.0%
RAGNAR THORSET I EIGE....	Norway		n.a.	n.a.	n.a.	9.4%	41.3%
THE FAMILY SAGA	Norway	Series-General	n.a.	n.a.	n.a.	9.4%	24.9%
TOTAL SECURITY	USA	Series-Crime	n.a.	n.a.	n.a.	8.7%	26.5%
WYCLIFFE	UK	Series-Crime	n.a.	n.a.	n.a.	8.5%	22.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
HBAL W. CHMP NORWAY-FRANCE		Sport	12/12	17:50	110	34.1%	76.0%
NEWS	Norway	News	05/04	21:00	33	34.2%	69.3%
NEWS	Norway	News	12/12	18:38	2	32.9%	73.7%
SPORTSXTRA W. CHMP		Sport	12/12	20:10	45	31.1%	61.4%
FBAL CUP FINALE BRANN-RBK		Sport	30/10	16:55	119	30.2%	83.0%
WEATHER FORCAST	Norway	News	05/04	21:36	4	29.9%	61.2%
HBAL W. CHMP NORWAY-AUSTRIA		Sport	11/12	19:47	81	28.8%	63.0%
DEAR, DEAR ALFRED	Norway	Variety Show	05/04	20:05	110	28.8%	60.3%
NEWS	Norway	News	14/02	21:00	19	27.8%	58.5%
SPORTSXTRA W. CHMP VAIL		Sport	09/02	21:25	35	27.2%	55.6%

Source: TV 2

TV 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
J.A.G	USA	Series-Action	46	21:30	47	3.3%	9.1%
E.R.	USA	Series-General	29	21:30	46	2.8%	7.4%
THE NET	USA	Series-Action	15	21:30	47	2.7%	7.2%
DAWSONS CREEK	USA	Series-General	19	20:00	45	2.6%	7.7%
LANCEM NIKITA	USA	Series-Action	44	21:30	48	2.6%	9.8%
MARRIED WITH CHILDREN	USA	Sitcom	6	19.30	23	2.5%	12.1%
NANNY	USA	Sitcom	231	21:00	24	2.3%	6.1%
CHARMED	USA	Series-Mysterious	44	20:00	47	2.2%	7.2%
V.I.P	USA	Series-Action	11	21:30	46	2.1%	5.6%
SEX IN THE CITY	USA	Series-Comedy	11	23:30	25	2.1%	20.8%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CL BORUSS-ROSENBORG	Sport	18/10	21:45	n.a.	18.7%	42.9%
FBAL CL ROSENBORG-B. MUNCHEN	Sport	23/11	21:45	n.a.	17.6%	43.6%
FBAL CL ROSENBORG-BOAVISTA	Sport	26/10	21:45	n.a.	17.4%	42.2%
FBAL CL ROSENBORG-BORUSS	Sport	28/09	21:45	n.a.	17.3%	44.7%
FBAL CL FEYEN-ROSENBORG	Sport	01/11	21:45	n.a.	15.8%	36.6%
FBAL CL ROSENBORG-FEYEN	Sport	21/09	21:45	n.a.	15.6%	43.0%
FBAL CL BORUSS-ROSENBORG	Sport	18/10	20:40	n.a.	15.3%	34.8%
FBAL CL ROSENBORG-BOAVISTA	Sport	26/10	20:40	n.a.	14.7%	35.5%
FBAL CL ROSENBORG-B. MUNCHEN	Sport	23/11	20:40	n.a.	14.3%	33.8%
FBAL CL BORUSS-RBK	Sport	18/10	21:45	n.a.	14.2%	31.7%

Source: TV 3 Research

TVNORGE							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MONDAY CLUB	Norway	Talk Show	n.a.	21:30	n.a.	8.5%	21.7%
TONIGHT WITH THOMAS GIERTSEN	Norway	Comedy Show	24	21:30	n.a.	6.9%	18.5%
WESENSTUND	Norway	Talk Show	n.a.	21:30	90	6.3%	16.3%
KEEPING UP APPEARANCES	UK	Sitcom	40	20:00	24	4.9%	12.7%
71 DEGGRADER NORD	Norway	Reality Show	8	20:30	n.a.	4.0%	10.7%
AROUND THE WORLD	Norway	Game Show	n.a.	20:30	n.a.	3.4%	9.0%
VÅR UTROLIGE VERDEN: MAGIKERNE	n.a.	Variety Show	n.a.	20:35	n.a.	3.2%	8.8%
PROVIDENCE	USA	Series-General	17	20:30	47	2.9%	7.9%
HELP, WE ARE ON TV	n.a.	Comedy-Show	n.a.	20:30	n.a.	2.7%	7.1%
INSPEKTØR FOWLER	n.a.	Series-Crime	n.a.	20:00	n.a.	2.6%	7.1%

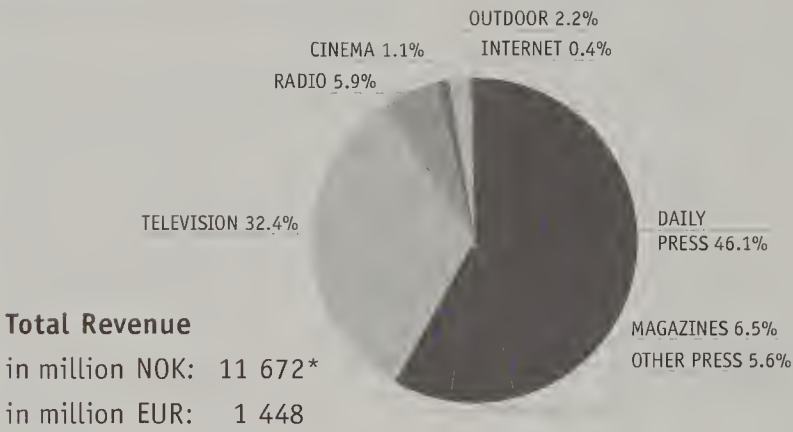
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CHELSEA-VIF		Sport	03/04	21:50	n.a.	15.4%	40.2%
FBAL EM LATVIA-NORWAY		Sport	09/10	18:55	n.a.	11.6%	30.5%
FBAL VIF-CHELSEA		Sport	18/03	20:00	n.a.	9.2%	23.8%
HBAL NORWAY-AUSTRIA		Sport	n.a.	20:50	n.a.	8.8%	22.3%
FBAL REAL MADRID-CHELSEA		Sport	n.a.	21:00	n.a.	8.4%	23.2%
FALSK FORTID	USA	Movie	12/05	21:20	n.a.	8.4%	24.8%
FBAL UEFA-CUP VIKING-W. BREMEN		Sport	n.a.	19:00	n.a.	7.3%	19.9%
FBAL CHELSEA-MALLORCA		Sport	n.a.	20:40	n.a.	7.3%	20.0%
FBAL UEF-CUP VIKING-S. LISB.		Sport	n.a.	20:50	n.a.	6.6%	18.6%
BEVERLY HILLS COP	USA	Movie	n.a.	21:25	n.a.	6.6%	16.7%

Source: TV Norge research

Advertising Expenditure

ADVERTISING FIGURES	GROSS	NET
Total adspend (in million NOK)	11 620	7605
Total adspend (in million USD)	1 454	952
Total adspend (in million EUR)	1 441	943
TV adspend (in million NOK)	3 779	1870
TV adspend (in million USD)	473	234
TV adspend (in million EUR)	469	232
TV adspend in % of GDP	0.31	0.2
TV adspend per capita (USD)	106.4	52.65

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

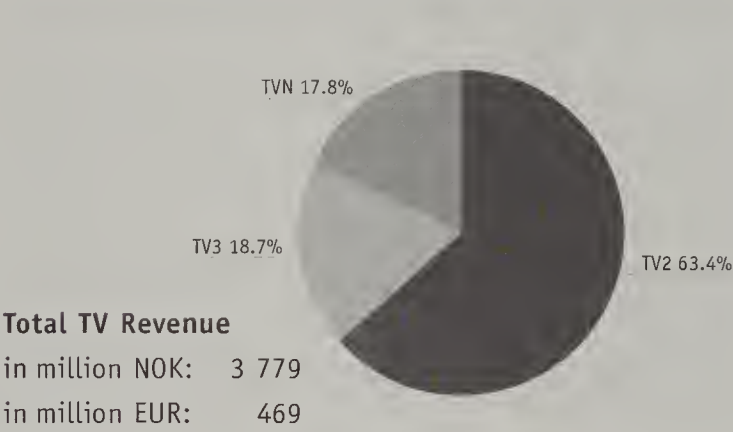


*includes Internet

TV ADVERTISING STATISTICS	
Total number of spots broadcast	289 155
Average spot length (in sec.)	25.72
Total number of advertisers	31 508
Number of TV advertisers	500
Total number of advertised products	18 262
Number products advertised on TV	1 360

Source: AC Nielsen Reklame-Statistikk, Carat Media & Research

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
GROCERY FOOD SHOP	1 245.8	866.5	70%	23%
RETAIL	603.4	468.7	78%	12%
HYGIENE/COSMETICS	579.7	400.2	69%	11%
CHAINSTORES	1 927.4	377.3	20%	10%
ENTERTAINMENT	493.6	274.2	56%	7%
ADVERTISING/INFORMATION	974.5	273.9	28%	7%
CAR ACCESSORIES	966.1	203.4	21%	5%
HYGIENE/COSMETICS	137.8	125.3	91%	3%
FABRIC/CLOTH/SHOES	517.9	124.7	24%	3%
OFFICE/IT	772.0	124.7	16%	3%
OTHER	3 401.7	540.5	16%	14%
TV Advertisers				
LILLEBORG DAGLIGVARE	182.3	161.6%	88.6%	4.3%
UNIVERSAL MUSIC AS	75.6	74.1%	98.0%	2.0%
PROCTER & GAMBLE NORWAY	75.9	69.7%	91.8%	1.8%
RINGNES AS	81.3	68.8%	84.6%	1.8%
COCA-COLA NORGE AS	80.8	67.5%	83.5%	1.8%
NORELOR AS	94.9	63.3%	66.7%	1.7%
STABBURET AS	76.5	59.9%	78.3%	1.6%
MØLLER HARALD A. AS	143.2	59.9%	41.8%	1.6%
TINE NORSKE MEIERIER BA	102.8	58.5%	56.9%	1.5%
DRESSMANN AS	72.7	57.2%	78.8%	1.5%
OTHER	10 633.8	3038.9%	28.6%	80.4%
Total (in million NOK)	11 619.8	3779.4	33%	100.0%
Total (in million EUR)	1 441	469	33%	100.0%

Source: Norwegian Advertising Statistics (NRS)

Portugal

The main players of the Portuguese television landscape are the private broadcasting companies Sociedade Independente de Comunicacao (SIC) and TV-I, as well as the state-owned, public service broadcaster RTP with its two channels RTP1 and RTP2.

Soap operas are very popular in Portugal. Accordingly, the success of generalist channel SIC may among other things be led back to its transmission of telenovelas (soap operas) from brazilian TV Globo. Besides this, SIC's programming also consists of information, entertainment and youth programmes. In 1999, SIC reached 47.7% (share) of the population. The channel, owned by a group whose major shareholders are SOINCOM (a media group), Globo and Edisport (also a media group) takes the major share of Portuguese television advertising. Since its introduction in 1992 as first private station in Portugal, SIC has gained a large proportion of the audience share and since 1995 is continually market leader.

TVI, which was originally a Catholic Church channel, broadcasts mainly news, soap operas, documentaries and movies, that is to say a mixture of entertainment and information – but with limited success. TVI recorded an audience share of 16.4% in 1999. It now belongs to a Portuguese media group, called SOCI.

RTP 1, which was launched in 1957, is also a generalist channel. It shows news, Portuguese soaps, entertainment programmes. In 1999, it reached an audience share of 29.8%, one percent point less than the year before. The channel is owned by the state-owned public service broadcaster Radiotelevisão Portuguesa (RTP) who also owns RTP2 and RTP International, an overseas satellite service available to Portuguese-speaking countries worldwide. Advertising on RTP2 is completely prohibited, on RTP1 it is restricted to seven and a half minutes per hour. Both channels receive government support.

The advertising of private channels such as SIC and TVI is limited to 15% of their transmission in day time and 20% in prime time. Alcohol advertising is allowed only after 10 p.m. SIC and TVI are also obligated to show Portuguese productions in 40% of their programming.

Portugal presently has four Pay TV channels. In 1998, Premium TV started with two movie channels, Telecine1 and Telecine2. Playboy started in 1999. They are owned by TV Cabo (46%), SIC and Globo (46%), Lusomundo a movie distributor (8%). Sport TV, is a Portuguese sport channel, owned by TV Cabo, RTP and Olivedesportos.

Because of the limited number of terrestrial channels, cable and satellite TV are used by more and more people to increase the number of receivable channels. The cable industry in particular in Portugal shows a steady increase in its subscribers. In 1994, only 20 000 homes had cable. Figures for the end of 1999 show approx. 750 000 subscribers.

In 1999, the 20 top programmes of all categories which reached most of the Portuguese were placed by SIC, like-

wise the top movies were almost all shown on SIC. Merely in the category of the most watched sports events, RTP1 could reach huge audiences with the transmission of football matches. All of the most watched programmes are in the Portuguese language. Foreign, imported movies and series do not tend to attract big audiences, because rather than being dubbed, all the foreign programmes have subtitles.

The panorama regarding television in Portugal in 1999 clearly reveals that SIC maintained its leadership with a (commercial) audience share of 51.2% and that the other private television station, TVI, underwent a slow but sharp increase, going from a (commercial) audience share of 14% to 18.5%. The latter channel has gained ground at the expense of the state-run RTP 1.

The Portuguese advertising market underwent further growth in 1999, at a rate of 19%. In 1999, television advertising, which accounts for 53% of all investment in advertising, increased at a rate of 17%. This is partly due to the heavy investment on the part of telecommunications companies, both the already existent and very competitive mobile telecommunications companies and the land communication companies, which launched their activity in 1999.

The investment share per channel has progressed along the same lines as the audience share – SIC decreased its investment share from 55.6% to 53.2%; RTP from 31.2% to 29% and TVI increased its share from 13.2% to 17.8%. This distribution of advertising budgets also results from the fact that TVI has a more aggressive price policy, almost always chosen as a means to increase frequency. SIC is the only channel that provides fast and good coverage, due to the fact that it reaches average daily audiences of approximately 30% during prime time, when the spots are more expensive but less crowded.

As in Portugal all advertising agencies buy through Media Buyers, there are only a few direct clients and these are not very important in terms of investment. The most important advertisers are the multinational advertisers especially those selling personal products, food, communication services and equipment, car industry, beverages, for example Lever, Procter & Gamble, Sin-coral, Nestlé Portugal, Arbora & Ausonia.

Portugal

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General Data

COUNTRY	
Land area (km ²)	91 825
Total population	9 979 000
Number of households	30 020 000*
Average household size	3.3
In % of households equipped	
Phone	83.5*
Mobile telephone subscribers	30.8*
PC's	33.4**
Internet access	21.6**
Internet user, last month	13.0**

Sources: *INE, 1998; **Marktest 2° trim. 1999

ECONOMICS	
GDP in billion PTE (at current prices)	19 502***
GDP per capita in PTE (at current prices)	1 799 000****
Inflation rate in 1999 (in %)	2.2****
Value of PTE in Euro (EUR)	1 EUR = 200.48 PTE
Value of PTE in US-Dollar (USD)	1 USD = 198.00 PTE

Sources: ***Marktest 1998, ****Banco Portugal 1999

TV OVERVIEW	
Total number of TV households (TVHH)	2 991 000
In % of all households	99.1%
Numbers of channels received by 70% of the population	4
TV License-Fee cost per year	none

TV EQUIPMENT	
	in % of TVHH
Colour TV	91.7
Multiset (homes with more than 1 TV set)	69.0
VCR	62.6
Teletext	39.6
Remote control	90.0

Sources: Martest Audimetria, 1999 (Values ref. Portugal Continental);
'Statistical Yearbook 2000; European Audiovisual Observatory

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	45.1 ¹
	connected	21.5
Satellite	Private dish/DTH	6.6
	Collective dish/SMATV	6.3
Terrestrial	analog	67.9
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	317 000	Digital TV subscribers	n.a.

Source: TV Cabo

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
RTP 1	1957	T, C	100%	Portuguese	151	Generalist	Adv., Gvt.	RTC
RTP 2	1968	T, C	100%	Portuguese	100	Sport, Culture	Gvt.	n.a.

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
SIC	1992	T, C	100%	Portuguese	162	Generalist	Adv.	SIC
TVI	1993	T, C	100%	Portuguese	150	Generalist	Adv.	TVI

Source: Marktest, 1999

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ARTE	Public	C	13.7%	French/German	Cultural	L–F, Spon.
BBC PRIME	Public	C, S	n.a.	English	Entertainment	Adv.
BBC WORLD	Private	C, S	9.0%	English	News	Adv.
BLOOMBERG TV	Private	C	n.a.	English	News	Adv.
CANAL BRASIL	Private	C	n.a.	Portuguese	Movies	Adv.
CARTOON	Private	C	23.7%	English	Cartoons	Adv.
CNBC/NBC EUR.	Private	C	21.1%	English	Finance	Adv.
CNL	Private	C	n.a.	Portuguese	News	Adv.
CNN	Private	C, S	23.7%	English	News	Adv.
DISCOVERY	Private	C, S	n.a.	English/Sub. Portuguese	Docum.	Adv.
DWELLE	Public	C	12.0%	German	Generalist	L–F
EURONEWS	Private	C, S	12.4%	Spanish/English	News	Adv.
EUROSPORT	Private	C, S	28.1%	Eng./Port.	Sports	Adv.
FASHION TV	Private	C	n.a.	French	Fashion	Adv., Sub.
GNT	Public	C	n.a.	Portuguese	Generalist	Adv., Sub.
HISTORIA	Public	C	n.a.	Portuguese	Documentary	Adv., Sub.
HOLLYWOOD	Private	C, S	n.a.	Sub. Span./Portuguese	Movie	Adv.
MCM	Private	C	n.a.	French	Music	Adv., Sub.
MOSAICO	Private	C	n.a.	Portuguese	Generalist	L–F
MTV EUROPE	Private	C, S	6.0%	English	Music	Adv.
MUZZIK	Private	C	n.a.	French	Music	n.a.
ODISSEIA	Private	C, S	n.a.	Portuguese	Docum.	Adv.
PANDA	Private	C	n.a.	Sub.Span./Portuguese	Children	Adv.
PARLAMENTO	Private	C	n.a.	Portuguese	Politics	Adv.
PEOPLE & ARTS	Private	C	n.a.	French	Culture	n.a.
QUANTUM	Private	S	n.a.	Portuguese	Teleshopping	Adv.
RTP AFRICA	Public	C	n.a.	Portuguese	Generalist	Adv.
SKY NEWS	Private	C	n.a.	English	News	Adv.
SOL	Private	C	n.a.	Portuguese/Spanish	Music	Adv.
TNT	Private	C	23.7%	English	Movies / Cartoons	Adv.
TRAVEL TV	Private	C, S	4.0%	English/sub. Portuguese	Travel	Adv.
TV 5 EUROPE	Public	C, S	15.4%	French	Generalist	L–F, Spon.
VH-1	Private	C	n.a.	English	Music	Adv.
VIVIR	Private	C	n.a.	Spanish	Society	Adv.
ZEE TV	Private	C	n.a.	Asian	Generalist	Adv.

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ANDALUCIA	Public	C	n.a.	Spanish	Generalist	Gvt.
TV GALIZA	Public	C	n.a.	Spanish	Generalist	Gvt.
DSF	Private	C	n.a.	German	Sport	Adv.
RAI 1	Public	C, S	n.a.	Italian	Generalist	L–F, Adv.
RAI 2	Public	C	n.a.	Italian	Generalist	L–F, Adv.
RTL	Private	C	n.a.	German	Generalist	Adv.
SAT 1	Private	C	n.a.	German	Generalist	Adv.
TVE 1	Public	C	n.a.	Spanish	Generalist	Gvt.
TV 3	Public	C	n.a.	Spanish	Generalist	Gvt.
M 6	Private	C	n.a.	French	Generalist	Adv., Sub.

Source: Marktest, 1999

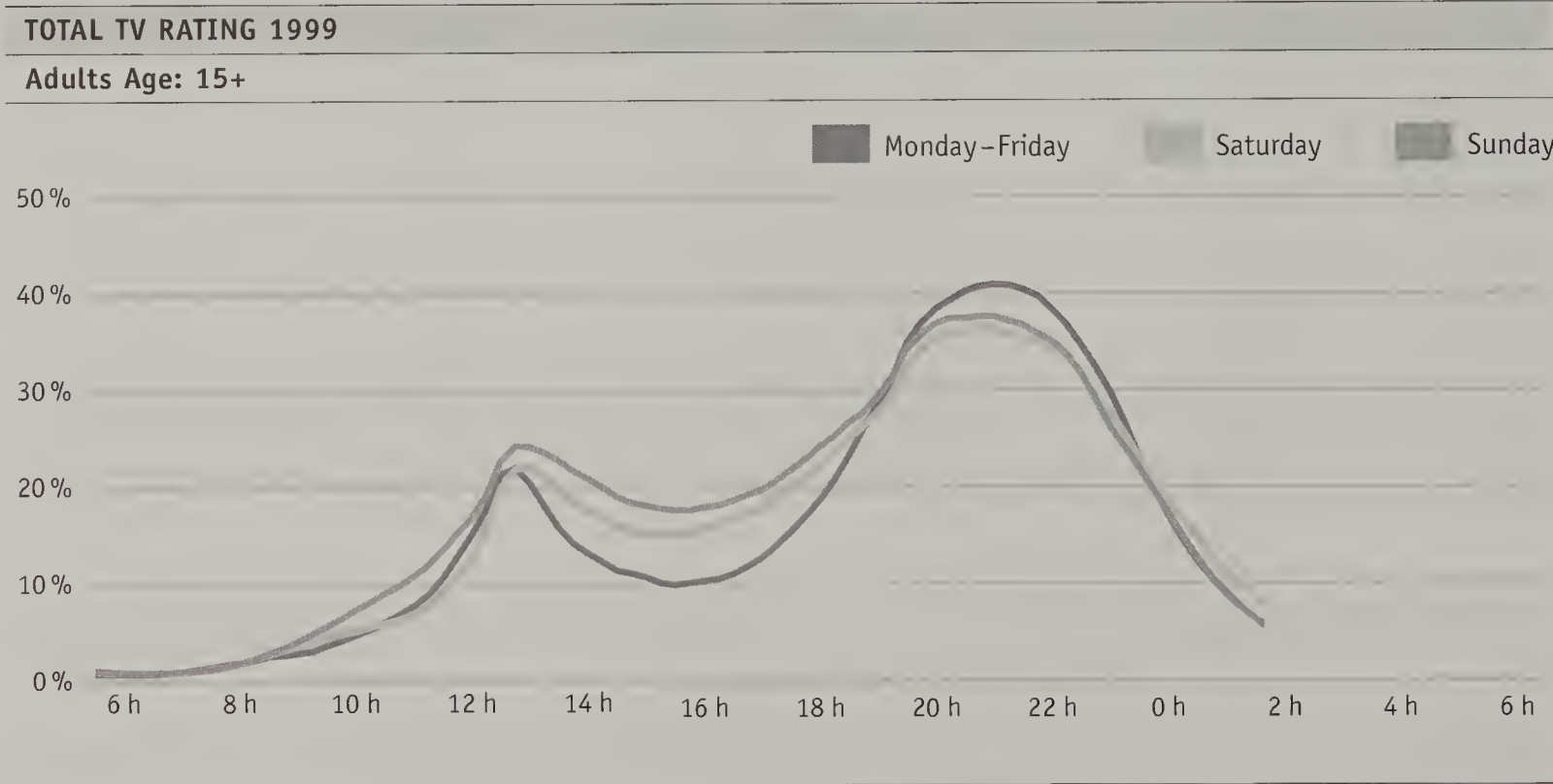
PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
TELECINE 1	1998	C	61 380	Sub.portuguese	168	Movies	PTE 2 000	Sub., Adv.	Premium
TELECINE 2	1998	C	61 380	Sub.portuguese	168	Old movies	PTE 2 000	Sub., Adv.	Premium
SPORT TV	1998	C	232 000*	Portuguese	77	Sports	PTE 3 000	Sub., Adv.	TV Cabo
PLAYBOY	1999	C	23 565	Portuguese	168	Adults	PTE 1 000	Sub.	n.a.

Source: TV CABO, 1999 *April 2000

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	Marktest-Audimetria
Panel/ Sampling Size	600 households/2 077 individuals
Instrument used (people-meter, telefon, face-to-face)	People-meter
	Population size in 000
Individuals 4+	8 972
Adults 15+	7 528
Housewives	3 018
Young Adults 15–24	1 524
Children 4–14	1 444

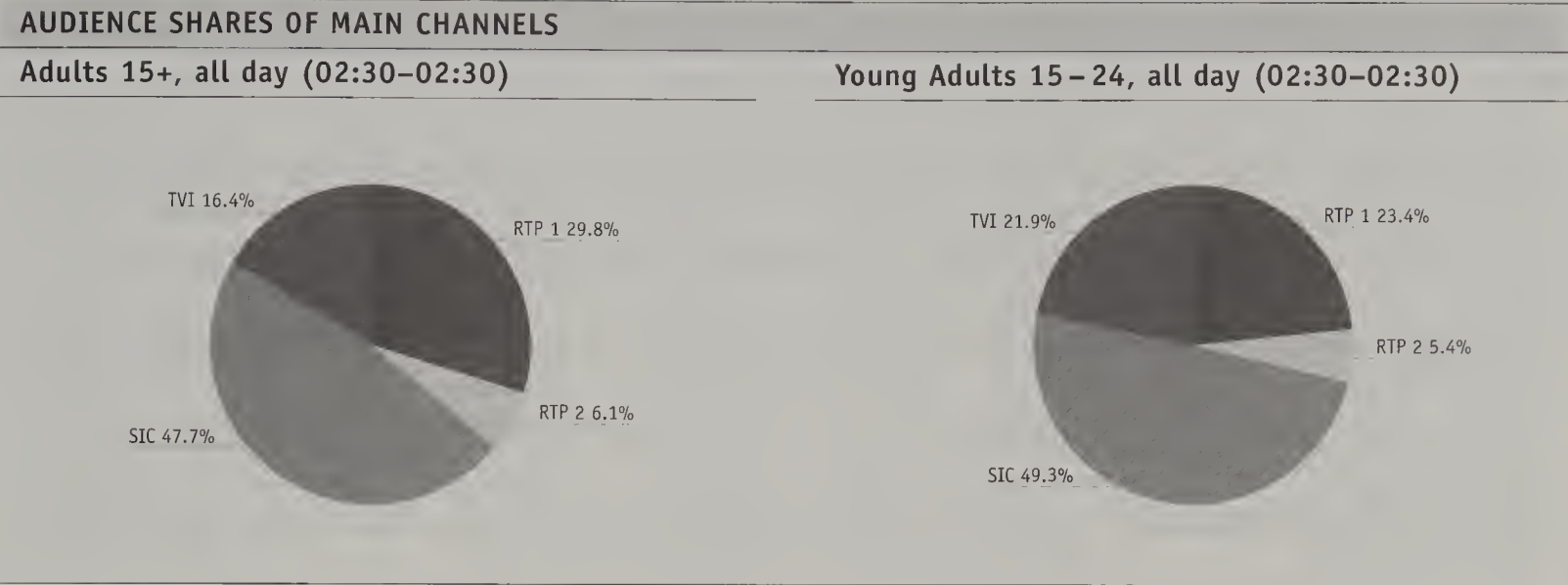
Source: Marktest, 1999



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 15+			Children 4–14			Young Adults 15–24			Housewives		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	71.0	69.0	78.0	61.0	58.0	76.0	59.0	56.0	72.0	73.0	71.0	82.0
Viewing time per Viewer	244	240	250	195	187	227	188	187	212	269	265	282
Viewing time per Individual	173	165	194	120	109	172	110	104	152	197	188	232

Source: AGB (until 1998), Marktest Audimetria (1999) / Since 1999 Marktest Audimetria includes all TV sets (multiset) in each household

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:30 – 02:30								
	Adults 15+		Young Adults 15–24		Children 4–14		Housewives	
	1998	1999	1998	1999	1998	1999	1998	1999
RTP 1	32.4%	29.8%	25.9%	23.4%	24.2%	21.2%	32.1%	30.0%
RTP 2	6.2%	6.1%	5.0%	5.4%	6.3%	4.9%	5.5%	5.5%
SIC	48.8%	47.7%	51.7%	49.3%	52.7%	50.7%	51.2%	49.3%
TVI	12.6%	16.4%	17.4%	21.9%	16.8%	23.2%	11.2%	15.1%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 15+		Young Adults 15–24		Children 4–14		Housewives	
	Day Time 8–20 h	Prime Time 20–23 h	Day Time 8–20 h	Prime Time 20–23 h	Day Time 8–20 h	Prime Time 20–23 h	Day Time 8–20 h	Prime Time 20–23 h
RTP 1	31.6%	31.2%	23.3%	24.9%	20.8%	23.4%	32.7%	30.4%
RTP 2	5.9%	5.6%	5.4%	5.3%	4.8%	5.4%	5.1%	5.1%
SIC	45.9%	50.2%	47.7%	52.9%	47.0%	55.0%	47.1%	52.6%
TVI	16.5%	13.0%	23.7%	16.9%	27.3%	16.2%	15.1%	11.9%

Source: Marktest, 1999

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
TERRA NOSTRA	Brazil	SIC	Ser.-Daily Soap	21:23	30/12	29.2%	74.3%
TORRE DE BABEL	Brazil	SIC	Ser.-Daily Soap	22:25	02/04	28.7%	75.5%
PONTO DE ENCONTRO	Portugal	SIC	Entertain.	21:48	12/03	28.2%	65.6%
SUAVE VENENO	Brazil	SIC	Ser.-Daily Soap	22:18	18/11	27.3%	69.3%
MÉDICO DE FAMÍLIA	Portugal	SIC	Series	21:05	16/03	27.2%	61.6%
UM SARILHO CHAMADO MARINA	Portugal	SIC	Series	21:13	12/03	27.0%	63.0%
A LOJA DO CAMILO	Portugal	SIC	Series	21:00	11/11	26.5%	64.7%
FBAL BENFICA-F.C.PORTO	Portugal	SIC	Sport	20:56	24/04	25.5%	68.2%
RESIDENCIAL TEJO	Portugal	SIC	Series	20:51	19/11	25.2%	66.1%
FBAL UEFA BENFICA-CELTA VIGO	Portugal	SIC	Sport	20:28	09/11	24.9%	58.5%
CLUBE DE CAMPEÕES	Portugal	SIC	Series	20:59	20/12	24.8%	61.2%
CONVERSA DA TRETA	Portugal	SIC	Entertain.	21:07	03/02	24.6%	54.3%
JORNAL DA NOITE	Portugal	SIC	News	19:58	03/03	24.3%	58.6%
OS MALUCOS DO RISO	Portugal	SIC	Entertain.	21:03	01/12	24.1%	59.4%
BRAVO BRAVÍSSIMO	Portugal	SIC	Entertain.	21:10	23/12	24.0%	63.9%
FBAL BENFICA-PAOK SALONICA	Portugal	SIC	Sport	19:24	04/11	23.8%	59.5%
POLÍCIAS À SOLTA	Portugal	SIC	Series	21:10	31/01	23.5%	58.4%
FBAL BENFICA-BOAVISTA	Portugal	SIC	Sport	18:57	24/10	23.5%	60.9%
OS MALUCOS DO RISO-REPETIÇÃO	Portugal	SIC	Entertain.	21:06	08/01	23.4%	58.2%
BRAVO BRAVÍSSIMO NACIONAL	Portugal	SIC	Entertain.	21:08	09/05	22.3%	57.0%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
BEETHOVEN II	USA	SIC	18:22	26/12	17.1%	52.5%
POLICE ACADEMY	USA	SIC	17:58	01/12	15.9%	49.9%
BACKDRAFT	USA	SIC	17:23	17/01	15.8%	50.9%
THE CRAFT	USA	SIC	17:55	01/11	15.7%	51.2%
THE LITTLE BIG LEAGUE	USA	SIC	17:45	03/01	14.5%	46.6%
ADEUS PAI	Portugal	RTP 1	21:06	09/01	14.1%	39.9%
TO GUILLIAN AT HER 37 BIRTH.	USA	SIC	18:00	07/03	14.1%	45.7%
PESADELO CÔR-DE-ROSA	Portugal	SIC	22:16	24/10	14.0%	49.6%
AIRFORCE ONE	USA	SIC	17:29	16/05	13.9%	52.7%
JURRASIC PARC	USA	RTP 1	21:02	02/01	13.4%	37.8%

TOP 10 SPORT EVENTS						
Title	Channel	Start.Time	Date	Audience	Share	
FBAL BENFICA-F.C.PORTO	SIC	20:56	24/04	25.5%	68.2%	
FBAL BENFICA-CELTA VIGO	SIC	20:28	09/12	24.9%	58.5%	
FBAL BENFICA-PAOK SALONICA	SIC	19:24	04/11	23.8%	59.5%	
FBAL BENFICA-BOAVISTA	SIC	18:57	24/10	23.5%	60.9%	
FBAL BENFICA-SETUBAL	SIC	19:59	20/09	21.9%	51.5%	
FBAL BENFICA-BOAVISTA	SIC	17:56	14/03	21.9%	67.0%	
FBAL BENFICA-B.MUNIQUE	SIC	20:56	10/08	21.0%	57.5%	
FBAL ALVERCA-SPORTING	SIC	19:15	17/10	20.9%	53.4%	
FBAL E.AMADORA-BENFICA	RTP 1	20:54	16/01	20.5%	50.5%	
FBAL PORTUGAL-NETHERLANDS	RTP 1	19:23	10/02	20.0%	48.4%	

Source: Marktest Audimetria-Telereport 1999

Top Programmes Channel by Channel

SIC							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TERRA NOSTRA	Brazil	Ser.–Daily Soap	35	21:23	144	29.2%	74.3%
TORRE DE BABEL	Brazil	Ser.–Daily Soap	66	22:25	95	28.7%	75.5%
PONTO DE ENCONTRO	Portugal	Reality–Show	36	21:48	70	28.2%	65.6%
SUAVE VENENO	Brazil	Ser.–Daily Soap	163	22:18	30	27.3%	69.3%
MEDICO DE FAMILIA	Portugal	Series	44	21:05	70	27.2%	61.6%
UM SARILHO CHAMADO MARINA	Portugal	Sitcom	40	21:13	33	27.0%	63.0%
A LOJA DO CAMILO	Portugal	Sitcom	4	21:00	29	26.5%	64.7%
RESIDENCIAL TEJO	Portugal	Series	6	20:51	91	25.2%	66.1%
CLUBE DOS CAMPEOES	Portugal	Sitcom	16	20:59	24	24.8%	61.2%
CONVERSA DA TRETA	Portugal	Entertainment	20	21:07	26	24.6%	54.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL BENFICA–F.C.PORTO	Portugal	Sport	24/04	20:56	134	25.5%	68.2%
FBAL BENFICA–CELTA VIGO		Sport	09/12	20:28	119	24.9%	58.5%
BRAVO BRAVÍSSIMO		Entertainment	23/12	21:10	85	24.0%	63.9%
FBAL BENFICA–BOAVISTA	Portugal	Sport	24/10	18:57	127	23.5%	60.9%
BRAVO BRAVÍSSIMO NACIONAL		Entertainment	09/05	21:08	88	22.3%	57.0%
FBAL BENFICA–BAYERN MUNICH		Sport	10/08	20:56	119	21.0%	57.5%
CHUVA ESTRELAS NACIONAL	Portugal	Entertainment	02/05	21:03	227	20.1%	63.3%
PORTUGAL FASHION 99	Portugal	Entertainment	12/11	20:52	110	19.8%	53.3%
CHUVA ESTRELAS EUROPEIA	Portugal	Entertainment	23/05	21:29	116	19.2%	50.2%
GLOBES DE EURO	Portugal	Entertainment	11/04	21:59	204	18.9%	71.2%

Source: Marktest Audimetria-Telereport 1999

RTP 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TELEJORNAL	Portugal	News	365	20:00	88	18.8%	47.1%
AS LIÇOES DO TONECAS	Portugal	Sitcom	48	21:04	35	17.6%	42.9%
CONTRA INFORMACAO	Portugal	Entertainment	269	20:47	16	16.9%	46.4%
NOS OS RICOS	Portugal	Sitcom	43	21:09	32	16.2%	38.0%
CROMOS DE PORTUGAL	Portugal	Sitcom	26	21:00	46	15.7%	36.3%
DOMINGO DESPORTIVO-1ªED.	Portugal	Sport	34	19:30	26	15.0%	40.9%
MR. BEAN	England	Series	7	21:32	56	13.5%	33.1%
DIARIO DE MARIA	Portugal	Series	47	21:14	59	13.2%	32.5%
HERMAN 99	Portugal	Talk Show	44	21:47	134	13.2%	37.6%
RTP1 JORNAL DA TARDE	Portugal	News	365	13:00	365	12.4%	53.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL ESTRELA AMADORA–BENFICA	Portugal	Sport	16/01	20:54	125	20.5%	50.5%
FBAL EU CHMP. PORTUG.–NETHERL.		Sport	10/02	19:23	123	20.0%	48.4%
GR. PRIX EUROV. DE LA CHANS. 99		Music	29/05	20:00	194	19.8%	56.0%
FBAL FC PORTO–SPORTING		Sport	30/10	18:52	125	19.7%	56.7%
FBAL FC PORTO–HERTHA BSC		Sport	08/12	19:38	119	19.3%	46.3%
FBAL CL PORTUGAL–ESLOVAQUIA		Sport	05/06	20:54	131	18.3%	50.2%
FBAL UEFA*		Sport	25/11	20:28	118	18.2%	42.0%
FBAL V.SETUBAL–BENFICA		Sport	16/02	20:55	126	18.1%	42.5%
FBAL MOLDE–FC PORTO		Sport	15/09	19:34	131	17.1%	45.7%
UNIVERSO RTP		Entertainment	08/03	21:06	23	14.7%	33.5%

Source: Marktest Audimetria-Telereport 1999

*CELTA DE VIGO X BENFICA

RTP 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
JORNAL 2	Portugal	News	365	22:00	60	6.8%	16.9%
ANIMAIS EM GRANDE PLANO	UK	Documentary	32	20:40	43	5.5%	13.7%
JOGO FALADO	Portugal	Sport Magazine	23	23:11	94	5.4%	23.0%
ONDA CURTA	Portugal	Music	50	20:27	23	5.4%	17.9%
BOM BORDO	Portugal	Sport Magazine	49	18:56	31	5.2%	18.1%
AMAZONIA INDOMITA	UK	Documentary	4	20:32	52	5.2%	12.7%
HORIZONTE DA MEMORIA	Portugal	History Magazine	51	22:49	29	5.0%	15.0%
RISCOS	Portugal	Series	69	20:44	21	4.6%	11.6%
O LUGAR DA HISTORIA	Portugal	History Magazine	51	22:47	54	4.6%	14.2%
O 3º CALHAU A CONTAR DO SOL	n.a.	Series	27	21:07	21	4.4%	10.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ICEHOCK ARGENTINA–PORTUGAL	Portugal	Sport	07/06	19:55	89	7.2%	20.9%
OS REFUGIADOS DE TIMOR	Portugal	News	24/09	22:58	17	5.3%	16.3%
THE MONSTER	USA	Movie	16/05	23:21	107	5.0%	24.3%
ICEHOCK PORTUGAL–SELEC.MUNDO	Portugal	Sport	05/12	17:47	123	4.6%	14.4%
ATLETISM-SEVILLA 99	Portugal	Sport	24/08	20:27	90	4.5%	13.0%
FBAL ARGENTINA–PORTUGAL	Portugal	Sport	10/06	18:55	105	4.1%	18.8%
CYCL-VOLTA PORTUGAL	Portugal	Sport	01/08	12:59	79	3.4%	16.4%
OS PIRILAMPOS SALVAM O NATAL	n.a.	Movie(children)	22/12	19:31	23	3.4%	10.3%
RIO BRAVO	USA	Movie	11/02	23:13	147	3.3%	23.2%
ICEHOCK P.C.PORTO–BARCELOS	Portugal	Sport	05/10	19:31	102	3.3%	9.7%

Source: Marktest Audimetria-Telereport 1999

TVI							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TODO O TEMPO DO MUNDO	Portugal	Series	24	21:32	60	11.4%	30.1%
DIRECTO XXI	Portugal	News	422	19:34	25	10.0%	26.9%
RI-TE RI-TE	Portugal	Entertainment	29	20:50	40	9.4%	22.6%
REIS DA MUSICA NACIONAL	Portugal	Entertainment	37	21:45	127	9.0%	25.1%
QUERO JUSTICA	Portugal	News Magazine	46	22:34	50	8.4%	23.2%
A PRIMEIRA VAGA	USA	Series	12	21:58	60	7.4%	18.6%
LIVING OCEANS	USA	Series	83	19:57	40	7.3%	18.1%
ONE FOR ALL	n.a.	Entertainment	12	21:23	70	7.2%	17.7%
FICHEIROS SECRETOS	USA	Series	24	22:46	60	6.7%	21.2%
A JUSTI CEIRA	USA	Series	12	22:11	55	6.5%	16.3%

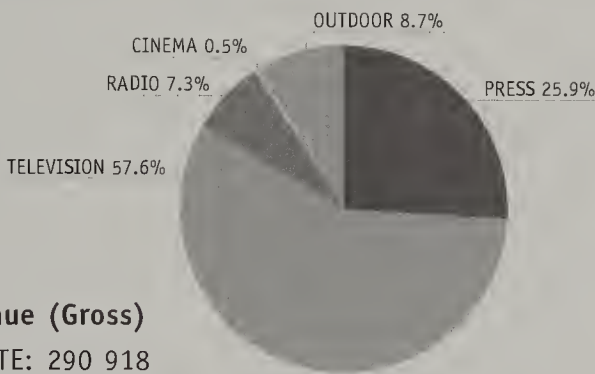
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
COLINA DO SOL	Portugal	News Magaz.	09/05	22:00	42	12.4%	35.8%
FBAL SPORTING–ATLETICO MADRID		Sport	06/10	20:55	136	11.5%	43.5%
SPECIAL\TROCA DE SEXO	Portugal	News Magaz.	24/04	22:40	83	11.3%	44.1%
PADRE MARCELO–A EXPLOSAO DA FE	Portugal	News Magaz.	29/06	22:48	56	9.8%	34.0%
FBAL PORTO–BEIRA MAR		Sport	22/02	20:54	133	9.7%	36.1%
HA FESTA NO HOSPITAL	Portugal	Entertainm.	10/11	19:57	123	9.4%	22.0%
MR. BEAN	UK	Movie	12/04	21:39	84	9.1%	23.9%
MERLIN	USA	Movie	24/05	21:50	214	9.0%	35.5%
FBAL BEIRA MAR–CAMPOMAIOREN		Sport	10/02	16:37	172	8.7%	36.9%
FBAL UNIAO LEIRIA–BENFICA		Sport	31/03	20:01	118	8.4%	26.9%

Source: Marktest Audimetria-Telereport 1999

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million PTE)	290 918
Total adspend	(in million USD)	1 469
Total adspend	(in million EUR)	1 451
TV adspend	(in million PTE)	189 376
TV adspend	(in million USD)	956
TV adspend	(in million EUR)	941
TV adspend	in % of GDP	0.97
TV adspend	per capita (USD)	95.8

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue (Gross)

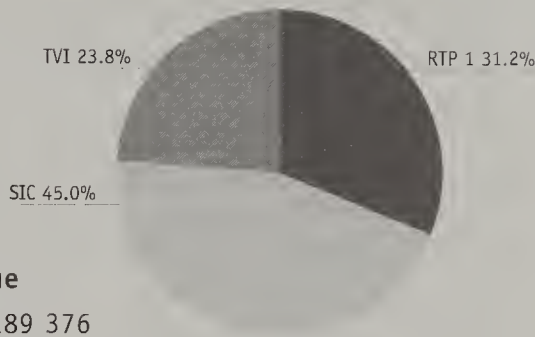
in million PTE: 290 918
in million EUR: 1 451

TV ADVERTISING STATISTICS	
Total number of spots broadcast*	615 013
Average spot length (in sec.)	34
Total number of advertisers	n.a.
Number of TV advertisers	1 239
Total number of advertised products	n.a.
Number products advertised on TV	3 481

Source: Marktest, 1999

*with channel promotion

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue

in million PTE: 189 376
in million EUR: 941

TOP 10 ADVERTISING FIGURES		
TV Advertising Sectors		Share of TV Expenditure
PERSONAL PRODUCTS	30 562	16.0%
FOOD	26 210	14.0%
COMUNIC. SERVICES AND EQUIP.	17 310	9.0%
CAR INDUSTRY	16 773	9.0%
BEVERAGES	16 071	8.0%
HOUSEHOLD PRODUCTS	12 363	7.0%
COMERCE	9 870	5.0%
FOTO AND CINEMA	8 490	4.0%
BANKING AND FINANC. INSTITUTES	8 284	4.0%
PERSONAL SERVICES	7 727	4.0%
OTHER	35 716	19.0%
TV Advertisers		
LEVERELIDA	8 106	4.3%
PROCTER & GAMBLE	7 844	4.1%
SINCORAL	6 887	3.6%
NESTLÉ PORTUGAL, SA	4 855	2.6%
ARBORA & AUSONIA	4 305	2.3%
OPTIMUS TELECOMUNICAÇÕES	3 489	1.8%
MEGADISCOS	3 105	1.6%
GRUPO MUNDIAL CONFIANÇA	3 081	1.6%
TELECEL	2 962	1.6%
SONAE	2 961	1.6%
OTHER	141 781	74.9%
Total (in million PTE)	189 376	100.0%
Total (in million EUR)	941	100.0%

Source: Marktest, 1999/Sabatina 1999

Spain

In 1999, the Spanish television market continued with both a stabilisation of general channels and the expansion of the two digital platforms set up two years ago.

In October 1999, the third digital platform Quiero Televisión signed the concession of a total of 14 channels, and began test broadcasting in mid-November. Company capital is set at 11,000 million pesetas; shareholders are Retevisión (49%), Media Park (15%), Sofiscable-98 (15%), Carlton Communications (7.5%) and a group of savings banks which hold the remainder.

The government has announced the granting of two new private television licences for October 2000, for which there are four applicants: Prensa Española (ABC) – which includes the French TFI company and the Portuguese SIC – Recoletos (Pearson) and El Mundo, COPE (the Catholic Church) and the Godó Group (La Vanguardia).

Television consumption in Spain rose slightly in 1999, following the trend of the previous year, to 213 minutes per person/day (individuals over 4 years of age). The major part of this consumption is still concentrated in prime time (20:30–24:00) with 73 minutes, followed by afternoon (50 minutes). Consumption structure stays the same, with Euskadi and Galicia having the lowest; Valencia has been the community with the highest consumption (218 minutes per person/day) and Catalonia has had the highest growth (over 8 minutes).

As regards consumption distribution (over the total population), market structure continues as in previous years. TVE I continues as leader, albeit losing a few tenths in relation to the previous year. This is followed by Antena 3 and Telecinco, the only channel to increase its share along with local channels and the two digital platforms Canal Satélite Digital (over 900 000 subscribers) and Vía Digital (over half a million subscribers).

Regarding programming, football is once again the leader, occupying 14 of the 20 programmes most widely watched in Spain. Football matches filled the ten biggest-audience sporting events. Home-produced series have increased their presence on television channel prime time; the Telecinco series Médico de Familia (Family Doctor) once again holds first place among the twenty programmes with biggest audience, and is again the most widely watched among the private channels. Cinema and entertainment programmes complete the offer.

The excellent year's end figure for advertising investment was comfortably higher than forecasted, reaching 1.7 billion pesetas, i.e., an increase of over 17% over the previous year. Investment in Conventional Media increased 14.5%, reaching over 837,000 million pesetas, according to a study by Infoadex.

Television has the largest quota of all the media (46%), with a 17.3% increase in investment, although Cinema has seen the greatest growth over the last two years.

Such a fantastic result is largely due to the increase in private consumption in our country (+4.4) and the incorporation of new technology and new operators. Altogether, 38 591 advertisers have invested in this sector.

By sectors, Cultura, Enseñanza y Medios de Comunicación (Culture, Teaching and Communication Media) had the largest investment and Telecomunicaciones (Telecommunications) the biggest growth.

Investment was headed by the Grupo Telefónica, Grupo El Corte Inglés and, in third place, Grupo Volkswagen.

Investment in television was 349 355 million; the sectors with the greatest investment include Food, Beauty, Health and Hygiene and Communication Media.

There has been a high concentration of large advertisers; 620 (14.8% of the total) invested over 100 million, constituting over 89% of the total investment in the medium.

The fantastic investment in this medium has been accompanied by an increase in channel occupation, with nearly 813 000 minutes of advertising (+8.7% over 1999). There are still major differences between the national and the autonomous channels, and as many have reached their legal advertising ceiling, the market has started to get more expensive – increases in sales costs – alongside a proliferation of sectors willing to pay more for the GRP than the traditional sectors. Sales by GRP cost are still the most common.

Of all the minutes of advertising broadcasted, conventional advertising is still the most successful, with 66.9%.

This year, digital platforms have begun to be commercialised. There are difficulties involved, such as lack of audience data (available from February 2000) and because it represents a change in purchasing mentality, more based on qualitative aspects such as target suitability and non-conventional formats, than the merely quantitative rating. Even so, commercialisation is continuing slowly but promises to improve. In 1999, activity was not very high, but it will increase in importance over the coming years, being, as it is, an emerging sector.

Spain

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General Data

COUNTRY	
Land area (km²)	505 992
Total population	40 558 746
Number of households	12 217 220
Average household size	3.3
In % of households/population equipped	
Phone	92.7/93.9
Mobile telephone subscribers	27.3/39.3
PC's	25.4/32.8
Internet access	6.3/9.3
Internet users, last 30 days	2.5/7.0

Source: I.N.E.–E.G.M. 1999 Universes

ECONOMICS	
GDP in billion PTA (at current prices)	92 450
GDP per Capita in PTA (at current prices)	2 279 000
Inflation rate in 1999 (in %)	2.2
Value of PTA in Euro (EUR)	1 EUR = 166.39 PTA
Value of PTA in US-Dollar (USD)	1 USD = 165.62 PTA

Source: I.N.E.–E.G.M. 1999 Universes

TV OVERVIEW	
Total number of TV households (TVHH)	12 181 000
In % of all households	99.7
Numbers of channels received by 70% of the population	5
TV License-Fee cost per year	none

Source: E.G.M. Feb–Nov '99 – RMB España Multimedia

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.2
Multiset (homes with more than 1 TV set)	59.4
VCR	68.2
Teletext	49.1
Remote control	89.4

Source: E.G.M. Feb–Nov '99 – RMB España Multimedia, *Statistical Yearbook '00 of the European Audiovisual Observatory

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	8.3*
	connected	3.6*
Satellite	private dish/DTH	5.8
	collective dish/SMATV	4.2
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	7.9%	Digital TV subscribers	5.1%

Source: E.G.M. Feb–Nov '99 – RMB España Multimedia

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TVE 1	1956	T	99.5%	Spanish	168	Generalist	Adv., Gvt.	In–house
LA 2	1965	T	99.4%	Spanish	147	Generalist	Adv., Gvt.	In–house

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
ANTENA 3	1990	T	98.4%	Spanish	168	Generalist	Adv.	In–house
TELE 5	1990	T	98.4%	Spanish	168	Generalist	Adv.	Publiespaña

Source: E.G.M. Feb–Nov '99 – RMB España Multimedia

DOMESTIC CHANNELS (REGIONAL PUBLIC)

Channels	Launch	Diff.	Tech. Pen.	Language	h/week	Programming	Revenue	Sales House
CANAL SUR	1989	T	19.5%	Spanish	137	Generalist	Adv., Gvt.	GDM
CANAL 2 ANDALUCIA	1998	T	10.5%	Spanish	n.a.	Generalist	Adv., Gvt.	GDM
TV3	1984	T	26.2%	Catalan	140	Generalist	Adv., Gvt.	In-house
CANAL 33	1989	T	22.0%	Catalan	126	Generalist	Adv., Gvt.	In-house
ETB 1	1982	T	8.3%	Basque	165	Generalist	Adv., Gvt.	RMB Spain
ETB 2	1986	T	8.5%	Spanish	140	Generalist	Adv., Gvt.	RMB Spain
TV GALICIA (TVG)	1985	T	6.0%	Galician	149	Generalist	Adv., Gvt.	RMB Spain
TELEMADRID (TVM)	1989	T	16.7%	Spanish	166	Generalist	Adv., Gvt.	Novomedia
CANAL 9	1989	T	14.1%	Valenc./Span.	137	Generalist	Adv., Gvt.	In-house
PUNT 2*	1997	T	8.6%	Valenc./Span.	80	News, Docu.	Adv., Gvt.	In-house
TVA CANARIAS	1999	T	1.2%	Spanish	80	Generalist	Adv., Gvt.	n.a.

Source: E.G.M. Feb-Nov'99 – RMB España Multimedia *last year: N9

INTERNATIONAL/PAN EUROPEAN CHANNELS

Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
TVE INT	Public	S	28.0%	Spanish	Generalist	Adv., Gvt.
EURONEWS	Public	C, S	1.1%	Spanish	News, Documentaries	Adv., Gvt.
TV 5 EUROPE	Public	C, S	1.2%	French	Generalist	L–F, Spon.
EUROSPORT	Private	C, S	10.9%	Spanish/English	Sport	Adv.
MTV EUROPE	Private	C, S	2.5%	English	Music	Adv., Sub.
CNN INT.	Private	C, S	5.1%	English	News, Documentaries	Adv.
NBC EUROPE	Private	C, S	n.a.	English	Generalist	Adv.
CARTOON NETWORK	Private	C, S	1.4%	English	Children	Adv.
BBC WORLD	Private	C, S	n.a.	English	News, Documentaries	Adv.
GALAVISION	Private	C, S	11.8%	Spanish	Generalist	Adv.

Note: Please note some of these channel are included in one of the digital packages, so their technical penetration will increase.

OTHER FOREIGN CHANNELS

Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
DSF	Private	C, S	0.6%	German	Sport	Adv.
VIVA TV	Private	C, S	1.0%	German	Music	Adv.
RAI 1	Public	C, S	17.0%	Italian	Generalist	L–F, Adv.
MINIMAX	Private	S	1.4%	Spanish	Children	Adv.
TELEDEPORTE	Public	S	4.3%	Spanish	Sport	Gvt.
TELENOTICIAS	Private	S	1.4%	Spanish	News	Adv.
DOCUMANIA	Private	S	1.4%	Spanish	Documentaries	Adv.
CANAL CLASICO	Public	S	3.4%	Spanish	Old Movies	Gvt.
SAT 1	Private	C, S	n.a.	German	Generalist	Adv.
RTL	Private	C, S	4.1%	German	Generalist	Adv.
CINE CLASSIC	Private	S	1.6%	Spanish	Old Movies	Adv.

Note: Please note some of these channel are included in one of the digital pacckages, so their technical penetration will increase. Source: SOFRES, AM – RMB España Multimedia

PAY TV (ANALOG)

Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Revenue	Sales H.
CANAL +	1990	T, S	1 800 000 (Feb. '00)	Spanish	160	Generalist	Sub., Adv.	GDM

Source: Canal + – RMB España Multimedia

DIGITAL PACKAGES

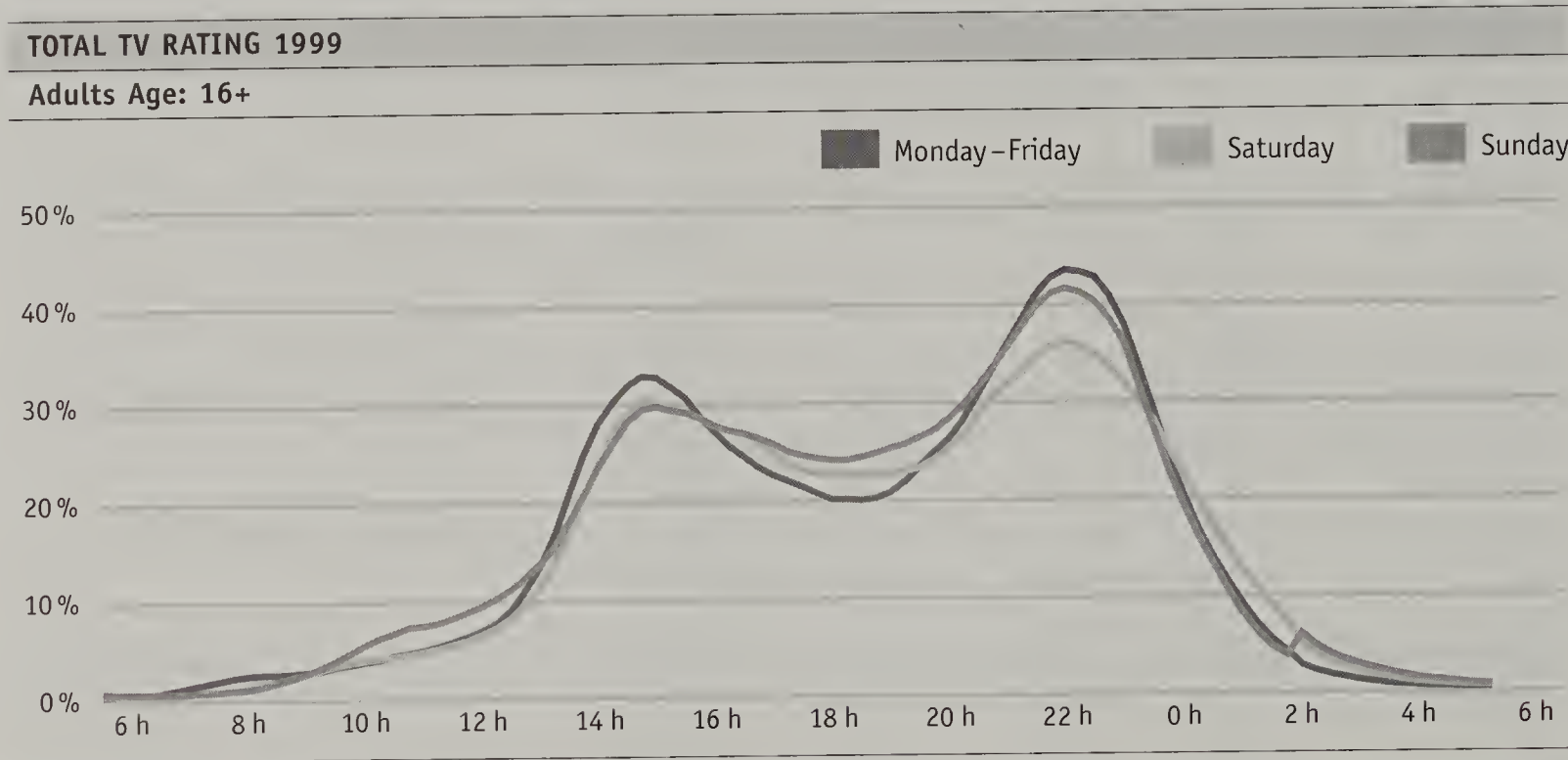
Channels	Launch	Diff.	Decoder	Subscr.	Language	No.of ch.	Revenue	Cost/month	Sales H.
CANAL SAT. DIGITAL	1997	S	SONY/PHILIPS	850 000*	Spanish	37	Sub., Adv.	2 595.– Pts	GDM/RMB
VIA DIGITAL	1997	S	ICHOSTAR/NOKIA	500 000**	Spanish	47	Sub., Adv.	2 500.– Pts	In-house

Source: Digital operators – RMB España Multimedia * Feb. '00, ** March '00

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	Sofres, A. M.	
Panel/Sampling Size	3 105 households/10 371 individuals	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	38 412	
Adults 16+	33 305	
Housewives	11 843	
Young Adults 13-24	7 006	
Children 4-12	3 696	

Source: Sofres, A.M. -RMB España Multimedia

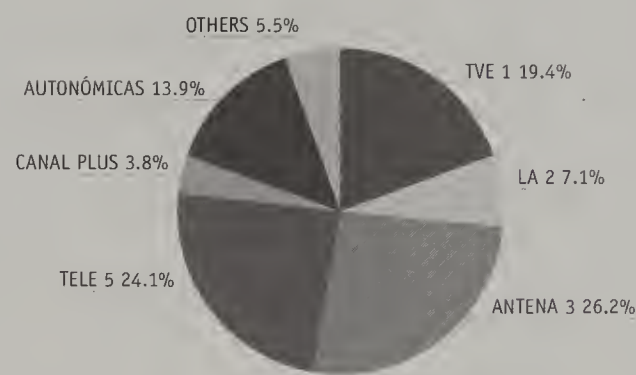


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 16+			Children 4-12			Young Adults 13-24			Housewives		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	79.0	79.0	80.0	76.0	76.0	77.0	74.0	74.0	74.0	83.0	83.0	84.0
Viewing time per Viewer	276	276	276	199	199	203	225	208	208	312	314	317
Viewing time per Individual	218	218	220	151	153	158	156	153	155	260	260	266

Source: Sofres, A.M. -RMB España Multimedia

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS	
Adults 16+, all day (02:30–02:30)	Young Adults 13–24, all day (02:30–02:30)



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:30 – 02:30								
	Adults 16+		Young Adults 13–24		Children 4–12		Housewives	
	1998	1999	1998	1999	1998	1999	1998	1999
TVE 1	26.4%	25.7%	19.9%	19.4%	19.3%	18.4%	27.2%	26.9%
LA 2	8.6%	7.9%	8.2%	7.1%	12.2%	10.9%	7.9%	7.2%
ANTENA 3	22.1%	22.0%	25.1%	26.2%	29.2%	29.5%	22.5%	22.5%
TELE 5	21.6%	21.1%	23.9%	24.1%	17.2%	18.8%	21.6%	21.6%
CANAL PLUS	2.3%	2.4%	3.8%	3.8%	2.2%	2.0%	1.8%	1.8%
AUTONÓMICAS	15.6%	16.6%	14.9%	13.9%	15.1%	14.9%	16.2%	16.3%
OTHERS	3.4%	4.4%	4.2%	5.5%	4.7%	5.4%	2.8%	3.7%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 16+		Young Adults 13–24		Children 4–12		Housewives	
	Day Time 7–20:30 h	Prime Time 20:30–24 h	Day Time 7–20:30 h	Prime Time 20:30–24 h	Day Time 7–20:30 h	Prime Time 20:30–24 h	Day Time 7–20:30 h	Prime Time 20:30–24 h
TVE 1	26.9%	24.6%	19.6%	18.6%	17.6%	19.2%	28.5%	25.2%
LA 2	8.1%	7.6%	7.4%	6.9%	13.2%	6.8%	7.1%	7.3%
ANTENA 3	22.5%	21.1%	27.1%	25.4%	29.1%	30.6%	23.3%	21.4%
TELE 5	20.7%	21.4%	23.4%	25.4%	17.1%	22.3%	21.0%	22.0%
CANAL PLUS	2.3%	2.5%	4.5%	3.1%	1.8%	2.4%	1.6%	2.2%
AUTONÓMICAS	15.7%	18.2%	12.7%	15.9%	15.5%	13.9%	15.4%	17.7%
OTHERS	3.8%	4.5%	5.4%	4.9%	5.7%	4.9%	3.1%	4.1%

Source: Sofres, A.M. –RMB España Multimedia

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
FBAL SPAIN-BRAZIL	Spain	TVE 1	Sport	20:17	13/11	22.1%	56.6%
FAMILY DOCTOR		Tele 5	Series-Family	22:05	21/12	21.9%	44.2%
FBAL SPAIN-ARGENTINA		TVE 1	Sport	21:48	17/11	21.5%	43.4%
FBAL MALLORCA-LAZIO ROMA		TVE 1	Sport	20:45	19/05	21.5%	51.4%
FBAL SPAIN-CROATIA		TVE 1	Sport	21:52	05/05	20.2%	41.8%
FBAL EU CUP SPAIN-AUSTRIA		TVE 1	Sport	21:44	27/03	19.4%	46.1%
FBAL EU CUP SPAIN-CYPRUS		TVE 1	Sport	21:46	08/09	19.2%	50.0%
FBAL VALENCIA-R.MADRID		TVE 1	Sport	21:48	09/06	17.8%	39.1%
FBAL AT. MADRID-VALENCIA		TVE 1	Sport	21:32	26/06	17.2%	54.6%
FBAL EU CUP SAN MARINO-SPAIN		TVE 1	Sport	21:26	31/03	17.2%	43.3%
MISS SPAIN AWARD	Spain	Tele 5	Variety Show	22:01	02/03	17.0%	39.0%
LETHAL WEAPON 3	USA	TVE 1	Movie	22:00	13/01	16.7%	38.9%
MATES	Spain	Antena 3	Series-Family	21:59	08/12	16.6%	34.3%
TWISTER	USA	TVE 1	Movie	21:35	26/12	16.6%	38.7%
THE MANSION	USA	TVE 1	Movie	21:42	24/01	16.5%	36.1%
JOURNALISTS	Spain	Tele 5	Series-Family	22:06	25/10	16.4%	34.3%
HUMAN TARGET	USA	TVE 1	Movie	21:59	03/02	16.0%	34.8%
PHENOMENON	USA	Tele 5	Movie	22:05	16/04	15.8%	36.9%
FBAL CELTA VIGO-OLYMPIQUE	USA	TVE 1	Sport	21:46	16/03	15.8%	33.4%
RICH BOY		Antena 3	Movie	22:00	04/01	15.6%	34.7%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
LETHAL WEAPON 3	USA	TVE 1	22:00	13/01	16.7%	38.9%
TWISTER	USA	TVE 1	21:35	26/12	16.6%	38.7%
THE MANSION	USA	TVE 1	21:42	24/01	16.5%	36.1%
HUMAN TARGET	USA	TVE 1	21:59	03/02	16.0%	34.8%
PHENONEMON	USA	Tele 5	22:05	16/04	15.8%	36.9%
RICH BOY	USA	Antena 3	22:00	04/01	15.6%	34.7%
QUICKLY & MORTAL	USA	TVE 1	21:42	07/02	15.5%	34.5%
TWO REBELLIOUS POLICEMEN	USA	Tele 5	22:04	05/03	15.5%	36.2%
MISSION: IMPOSSIBLE	USA	Tele 5	22:05	12/11	15.3%	36.5%
INSPECTORS	USA	Tele 5	22:07	09/12	15.0%	35.4%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL SPAIN-BRAZIL		TVE 1	20:17	13/11	22.1%	56.6%
FBAL SPAIN-ARGENTINA		TVE 1	21:48	17/11	21.5%	43.4%
FBAL MALLORCA-LAZIO ROMA		TVE 1	20:45	19/05	21.5%	51.4%
FBAL SPAIN-CROATIA		TVE 1	21:52	05/05	20.2%	41.8%
FBAL EU CUP SPAIN-AUSTRIA		TVE 1	21:44	27/03	19.4%	46.1%
FBAL EU CUP SPAIN-CYPRUS		TVE 1	21:46	08/09	19.2%	50.0%
FBAL VALENCIA-R. MADRID		TVE 1	21:48	09/06	17.8%	39.1%
FBAL AT.MADRID-VALENCIA		TVE 1	21:32	26/06	17.2%	54.6%
FBAL EU CUP SAN MARINO-SPAIN		TVE 1	21:26	31/03	17.2%	43.3%
FBAL EU CUP SPAIN-SAN MARINO		TVE 1	21:46	05/06	15.4%	46.2%

Source: SOFRES, A.M./Adults +16-Peninsula & Balearic Islands

Top Programmes Channel by Channel

TVE 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
WE ARE ON AIR	Spain	Variety Show	8	21:58	41	10.3%	23.7%
TELEDIARIO 2	Spain	News	237	20:59	45	10.2%	30.4%
TELED. FIN SEMANA 1	Spain	News	104	15:00	36	9.5%	31.8%
AT ELEVEN AT HOME	Spain	Ser.–Daily Soap	27	22:02	78	9.4%	19.7%
UNCLE WILY	Spain	Series–General	16	21:59	78	9.3%	18.9%
TELEDIARIO 1	Spain	News	261	15:00	53	8.9%	27.1%
PEOPLE	Spain	Magazine	244	20:02	53	8.5%	32.9%
TELED. FIN SEMANA 2	Spain	News	103	21:00	35	8.1%	25.1%
LUZ MARIA	Spain	Ser.–Daily Soap	40	16:44	102	8.0%	31.0%
DISTRIC CINEMA PRESENTATION	Spain	Documentary	52	17:40	186	7.9%	33.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL SPAIN–BRAZIL	Spain	Sport	13/11	20:17	110	22.1%	56.6%
FBAL SPAIN–ARGENTINA		Sport	17/11	21:48	113	21.5%	43.4%
FBAL MALLORCA–LAZIO ROMA		Sport	19/05	20:45	112	21.5%	51.4%
FBAL SPAIN–CROATIA		Sport	05/05	21:52	109	20.2%	41.8%
FBAL EU CUP SPAIN–AUSTRIA		Sport	27/03	21:44	111	19.4%	46.1%
FBAL EU CUP SPAIN–CHIPRE		Sport	08/09	21:46	108	19.2%	50.0%
FBAL VALENCIA–R.MADRID		Sport	09/06	21:48	107	17.8%	39.1%
FBAL AT. MADRID–VALENCIA		Sport	26/06	21:32	111	17.2%	54.6%
FBAL EU CUP SAN MARINO–SPAIN		Sport	31/03	21:26	111	17.2%	43.3%
LETHAL WEAPON 3	USA	Movie	13/01	22:00	135	16.7%	38.9%

Source: SOFRES, A.M./Adults +16–Peninsula & Balearic Islands

LA 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TO KNOW & TO WIN	Spain	Game Show	218	15:10	27	4.4%	13.1%
LIVING WITH MR. COOPER	USA	Ser.–Daily Soap	37	21:31	25	3.8%	8.5%
GIRO DE ITALIA	Italy	Sport	13	15:42	88	3.8%	12.6%
LA 2 NOTICIAS 3	Spain	News	232	22:02	24	3.7%	8.8%
PRIMI JUEGO	Spain	Game Show	49	23:10	7	3.5%	9.0%
THE WEATHER 22H	Spain	News	187	22:26	6	3.4%	7.7%
CYCLING VUELTA A ESPAÑA	Spain	Sport	14	14:19	105	3.2%	11.0%
THIS IS MY LAND		Documentary	9	21:48	58	3.0%	6.6%
BIG DOCUMENTARIES		Documentary	225	15:44	82	2.9%	10.4%
TV DOCUMENTS		Magazine	49	22:03	63	2.9%	7.5%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL SPAIN–AUSTRIA	Sport	26/03	21:45	109	6.7%	15.7%
FBAL EU CUP SPAIN–POLAND	Sport	07/05	14:32	101	6.5%	19.0%
BULLS/APRIL FESTIVAL	Sport	19/04	21:00	118	6.1%	17.7%
FBAL W.CUP SPAIN–MALI	Sport	21/04	17:00	126	5.6%	22.8%
FBAL EU CUP SPAIN–NETHERLANDS	Sport	04/06	20:59	98	5.5%	17.7%
FBAL EU CUP SPAIN–NORWAY	Sport	16/11	19:59	45	5.5%	14.9%
BULLS/CHARITY BULLFIGTH	Sport	17/06	20:59	101	5.4%	18.1%
BBAL CAJA S.FERNANDO–TAU CERAMICA	Sport	01/02	20:33	103	5.1%	11.4%
FBAL W. CUP SPAIN-BRAZIL	Sport	05/04	19:58	110	4.9%	17.5%
ATHLETICS W.CUP	Sport	26/08	17:59	109	4.7%	23.6%

Source: SOFRES, A.M./Adults +16–Peninsula & Balearic Islands

ANTENA 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MATES	Spain	Series-Family	35	22:02	92	11.6%	25.5%
LET'S GET DOWN TO WORK	Spain	Series-Family	74	22:34	79	10.0%	26.0%
STARS RAIN	Spain	Game Show	13	21:56	127	9.9%	24.7%
TROUBLE'S HOUSE	Spain	Series-Family	33	21:35	91	9.9%	22.6%
IT'S A DEAL	Spain	Game Show	21	21:49	146	9.6%	27.1%
FURY	Spain	Game Show	23	22:03	148	7.7%	23.4%
SWALLOW ME UP!	Spain	Game Show	4	23:11	104	7.6%	24.9%
NATIONAL PARODY	Spain	Game Show	10	22:38	117	7.2%	20.3%
SURPRISE, SURPRISE	Spain	Variety Show	20	21:59	234	7.1%	22.1%
SABRINA	USA	Series-Daily Soap	81	14:29	29	7.0%	23.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
RICH BOY	USA	Movie	04/01	22:00	115	15.7%	34.6%
FOUR WOMEN & A DESTINY	USA	Movie	22/02	21:59	119	14.4%	30.1%
FBAL UEFA CUP AT.MADRID-PARMA		Sport	06/04	21:29	108	14.3%	30.9%
BREAKDOWN	USA	Movie	04/10	21:58	113	13.9%	29.8%
A WALK AROUND THE CLOUDS	USA	Movie	01/03	21:59	120	13.9%	29.7%
FBAL UEFA CUP PARMA-AT.MADRID		Sport	20/04	21:30	110	13.7%	28.1%
CASPER	USA	Movie	27/12	21:59	113	13.1%	27.1%
KIDNAPPING	USA	Movie	18/01	22:00	128	12.9%	27.5%
CRISIS	USA	Movie	09/02	22:00	118	12.3%	26.4%
DIE HARD 3	USA	Movie	31/05	21:59	156	12.3%	30.4%

Source: SOFRES, A.M./Adults +16–Peninsula & Balearic Islands

TELE 5							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FAMILY DOCTOR	Spain	Series-Family	28	22:06	89	17.3%	37.2%
JOURNALISTS	Spain	Series-Family	27	22:05	92	14.1%	29.3%
THE POLICE INSPECTOR	Spain	Series-Crime	9	22:06	83	12.2%	26.4%
EL INFORMAL	Spain	Magazine	251	21:37	27	8.6%	22.4%
THEY ARE THIS WAY	Spain	Series-Family	22	22:20	66	8.2%	18.2%
ALLY MCBEAL	USA	Series-Family	51	22:39	56	7.6%	20.9%
PETRA DELICADO	Spain	Series-Crime	13	22:06	85	7.5%	17.0%
SEVEN LIFES	Spain	Series-Family	50	21:32	58	7.3%	18.9%
GOING OUT CLASSES	Spain	Ser.–Daily Soap	254	15:28	41	7.1%	22.1%
FERNANDEZ & FAMILY	Spain	Ser.–Daily Soap	6	21:33	32	6.9%	16.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MISS SPAIN AWARD	Spain	Variety Show	02/03	22:01	156	17.0%	38.8%
PHENOMENON	USA	Movie	16/04	22:05	144	16.0%	37.0%
TWO REBELLIOUS POLICEMEN	USA	Movie	05/03	22:04	140	15.6%	36.1%
MISSION: IMPOSSIBLE	USA	Movie	12/11	22:05	134	15.0%	36.6%
INSPECTORS	USA	Movie	09/12	22:07	128	15.2%	35.4%
THE SPECIALIST	USA	Movie	12/03	22:05	130	15.1%	35.4%
PASSENGER 57	USA	Movie	08/01	22:03	100	15.1%	33.8%
THE PEACEMAKER	USA	Movie	22/10	22:10	149	14.5%	35.2%
SABRINA (& HER LOVES)	USA	Movie	12/02	22:03	147	14.4%	33.1%
KILLERS	USA	Movie	09/04	22:04	151	14.2%	35.9%

Source: SOFRES, A.M./Adults +16–Peninsula & Balearic Islands

CANAL 9							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FUN PEOPLE	Spain	Game Show	33	21:53	135	9.4%	22.4%
TOMBOLA	Spain	Talk Show	52	21:44	247	9.2%	30.3%
OUTER LIMITS	USA	Ser.-Mysterious	23	22:10	52	8.9%	18.1%
FIRST WAVE	USA	Series-Action	13	21:30	49	8.1%	17.0%
BROOKLYN SOUTH	USA	Series-Crime	16	21:58	51	8.0%	17.4%
MUSIC IS THE CLUE	Spain	Game Show	252	15:27	35	7.6%	24.4%
MINUTE TO MINUTE	Spain	Sport (Magaz.)	39	21:09	42	7.4%	19.9%
A CENTURY OF SONGS	Spain	Game Show	34	21:41	164	7.5%	19.9%
HEAT, HEAT	Spain	Game Show	70	21:31	32	6.5%	20.9%
NEWS 9:1	Spain	News	365	13:59	86	6.4%	22.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL BARCELONA-VALENCIA	USA	Sport	18/02	21:32	109	23.9%	48.2%
FBAL BARCELONA-VALENCIA		Sport	27/02	21:02	110	21.6%	53.9%
FBAL R.MADRID-VALENCIA		Sport	16/06	21:33	112	21.4%	44.5%
FBAL VALENCIA-BARCELONA		Sport	20/11	21:00	110	20.3%	50.1%
THE SHAWSHANK REDENTION		Movie	31/01	21:42	151	19.7%	41.6%
FBAL VILLARREAL-R.MADRID		Sport	30/01	21:03	110	17.4%	42.1%
FBAL R.MADRID-VILLARREAL		Sport	21/01	21:02	112	17.4%	34.1%
FBAL R.BETIS-VALENCIA		Sport	13/03	21:00	108	16.9%	42.9%
STRIPTease	USA	Movie	28/03	21:28	133	16.4%	35.4%
GOLDENEYE	USA	Movie	28/02	21:57	152	16.1%	38.1%

Source: SOFRES, A.M./Adults +16-Valencia

PUNT 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MINUTE TO MINUTE	Spain	Sport	18	22:10	67	1.1%	2.6%
DO YOU REMEBER	Spain	Documentary	75	21:19	114	1.0%	2.2%
FULLES GROGUES	Spain	Documentary	18	23:01	44	0.9%	2.2%
PASAREL.LA	Spain	Music	25	23:11	101	0.7%	2.8%
L'URPA DE VELLUT	Spain	Documentary	7	19:45	28	0.7%	2.7%
NATIONAL GEOGRAPHIC	USA	Documentary	8	18:05	52	0.7%	2.3%
CRONICA SENTIMENTAL	Spain	Documentary	26	22:00	27	0.7%	1.8%
THE BABYSITTER	UK	Sitcom	26	21:44	22	0.6%	1.5%
SACRED EARTHS	Israel	Documentary	10	19:39	32	0.6%	2.1%
FOGUERES	Spain	Documentary	6	20:23	150	0.6%	2.1%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL AT. MADRID-DEPORTIVO CORUÑA	Sport	08/06	21:30	109	8.3%	16.4%
BBAL P. VALENCIA-B.FUENLABRADA	Sport	30/12	20:31	92	3.1%	7.9%
BBAL EU CUP P.VALENCIA-S.C.DELTA TARTU TALLIN	Sport	09/11	20:31	71	2.7%	7.2%
BBAL EU CUP PAMESA VALENCIA-KK ZADAR	Sport	05/10	20:30	80	2.7%	6.7%
FBAL BENIDORM-TENERIFE	Sport	13/01	21:05	113	2.6%	5.7%
BBAL EU CUP P. VALENCIA-POLZELA	Sport	12/10	20:30	75	2.6%	6.3%
FBAL LEVANTE-GETAFE	Sport	25/09	18:01	113	2.3%	9.2%
FBAL ELCHE-TENERIFE	Sport	12/10	18:32	111	2.3%	7.5%
BBAL EU CUP ARIS SALONICA-PAMESA	Sport	30/03	20:41	74	2.2%	5.9%
FBAL CASTELLON-ONTINYENT	Sport	13/11	18:03	109	2.2%	8.2%

Source: SOFRES, A.M./Adults +16-Valencia

TVG							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
LIVE TIDES	Spain	Series-Family	54	22:21	72	15.3%	34.9%
LUAR	Spain	Variety Show	25	21:37	162	11.7%	28.8%
MR. BEAN	UK	Sitcom	42	21:45	36	11.6%	29.7%
SUPERMARTES	Spain	Game Show	45	21:42	141	9.6%	23.8%
PRATOS COMBINADOS	Spain	Series-Family	81	22:04	48	9.0%	22.0%
NEWS 1	Spain	News	362	14:27	38	7.9%	26.9%
TEQUELEXOU	Spain	Game Show	41	22:29	88	7.8%	21.9%
GALICIA NEWS	Spain	News	243	13:55	24	7.7%	31.7%
A NOITE EN BLANCO	Spain	Magazine	26	21:44	144	7.5%	19.0%
WEEKEND SPORTS	Spain	Sport (News)	7	15:04	21	7.4%	23.3%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL UEFA CUP CELTA VIGO-OLYMPIQUE	Sport	16/03	21:47	112	28.0%	60.4%
FBAL CELTA VIGO-DEPORTIVO CORUÑA	Sport	20/01	21:19	117	26.1%	53.0%
FBAL DEPORTIVO CORUÑA-CELTA VIGO	Sport	03/02	22:57	38	24.9%	53.6%
FBAL UEFA CUP OLYMPIQUE-CELTA VIGO	Sport	02/03	21:16	111	23.9%	49.8%
FBAL DEPORTIVO CORUÑA-CELTA VIGO	Sport	18/12	21:03	111	23.4%	56.6%
FBAL DEPORTIVO CORUÑA-CELTA VIGO	Sport	03/02	21:04	113	23.1%	51.2%
FBAL BARCELONA-VALENCIA	Sport	27/02	21:02	110	22.0%	50.5%
FBAL CELTA VIGO-MALLORCA	Sport	16/01	21:02	115	20.6%	44.5%
FBAL VALENCIA-DEPORTIVO CORUÑA	Sport	06/02	21:02	115	19.6%	42.4%
FBAL UEFA CUP CELTA VIGO-BENFICA	Sport	25/11	21:29	115	18.6%	38.0%

Source: SOFRES, A.M./Adults +16-Galicia

ETB 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
GOENKALE	Spain	Series	215	21:38	45	3.8%	8.8%
KIROLEZ KIROL	Spain	Sport	226	17:44	139	2.9%	11.7%
PILOTA(D)	Spain	Sport	67	22:40	56	2.3%	7.4%
ETB KIROLAK	Spain	Sport	39	19:39	68	2.1%	8.1%
PILOTA	Spain	Sport	74	21:54	59	2.0%	8.0%
GOENKALE ESKER 1000	Spain	Variety Show	12	22:25	88	1.8%	5.7%
TXIRRINDULARITZA:M.KO	Spain	Sport	5	15:07	119	1.7%	6.2%
DONOSTIAKO SU FESTAK	Spain	Variety Show	8	23:16	61	1.6%	8.1%
SORGINEN LARATZA	Spain	Magazine	46	22:39	85	1.4%	3.5%
IZAR BILA	Spain	Game Show	22	18:55	78	1.4%	4.4%

Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL ATH.BILBAO-R.SOCIEDAD	Sport	04/12	21:00	113	19.5%	54.8%
FBAL BARCELONA-ATH.BILBAO	Sport	09/01	21:05	112	19.3%	42.5%
FBAL ALAVES-R.MADRID	Sport	21/12	21:32	111	15.5%	31.6%
FBAL AT.MADRID-R.SOCIEDAD	Sport	02/02	21:32	107	14.9%	30.8%
FBAL EUSKADI-NIGERIA	Sport	29/12	20:39	110	14.1%	33.0%
FBAL ALAVES-BARCELONA	Sport	22/05	21:01	110	13.8%	43.7%
FBAL R.SOCIEDAD-R.MADRID	Sport	08/05	21:02	116	13.3%	43.4%
FBAL AT.MADRID-R.MADRID	Sport	12/06	21:01	113	13.2%	42.2%
FBAL ESPANYOL-ATH.BILBAO	Sport	20/03	21:02	111	13.0%	39.9%
FBAL VALENCIA-BARCELONA	Sport	20/11	21:00	110	12.4%	32.5%

Source: SOFRES, A.M./Adults +16-Basque Country

ETB 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE NIGHT OF PRESENTATION	Spain	Magazine	32	22:02	24	9.0%	20.1%
FIRST WAVE	USA	Series-Action	14	22:01	52	7.9%	15.7%
STARGATE	USA	Series	21	21:59	52	7.8%	17.7%
FIRST WAVE	USA	Series-Action	9	22:54	51	7.4%	17.6%
STARGATE	USA	Series	27	22:54	49	7.2%	18.1%
NEWS 2	Spain	News	364	20:54	49	6.4%	18.8%
THE DERBY	Spain	Sport	37	21:27	50	6.0%	14.5%
LOURVIER'S EXPRESS	Spain	Comedy Show	11	22:00	57	5.2%	11.0%
PEÑA COLADA	Spain	Comedy Show	15	21:34	56	4.9%	21.3%
100% BASQUE PEOPLE	Spain	Magazine	13	22:01	215	4.8%	15.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE MASK	USA	Movie	05/01	22:36	104	18.4%	45.7%
GOLDENEYE	USA	Movie	16/02	22:18	144	18.0%	44.0%
FROM DUSK TILL DAWN	USA	Movie	06/04	22:20	111	16.7%	38.5%
THE SHAWSHANK REDENTION	USA	Movie	27/05	22:03	167	15.8%	38.4%
THE CLIENT	USA	Movie	09/12	22:00	139	15.2%	34.1%
EN EUSKADI:LICENCIA PARA MATAR	Spain	Documentary	17/02	22:09	52	14.9%	29.0%
THE PELICAN BRIEF	USA	Movie	07/10	22:02	160	14.5%	38.8%
IN THE LINE OF FIRE	USA	Movie	14/01	22:06	140	14.3%	36.3%
DAVE	USA	Movie	07/01	22:19	117	14.3%	33.4%
STRIPTease	USA	Movie	28/10	22:00	144	13.5%	31.9%

Source: SOFRES, A.M./Adults +16-Basque Country

CANAL SUR							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
RED NUMBERS	Spain	Game Show	29	21:17	155	12.8%	30.0%
HIGH PLACE	Spain	Series-Family	204	15:42	27	11.7%	31.1%
FUN PEOPLE	Spain	Game Show	50	21:35	135	11.5%	28.8%
GLORY PATHS	Spain	Sitcom	37	21:40	213	8.1%	22.6%
TALKING CLEAR	Spain	Talk Show	11	21:36	228	8.0%	23.2%
SPORT CLUB	Spain	Sport Magazine	54	19:13	172	7.8%	25.0%
BACK PAGE	Spain	Magazine	279	15:25	27	7.4%	21.1%
EXTRA BONUS	Spain	Game Show	20	21:42	178	6.7%	22.7%
SEMANA SANTA/SEVILLA	Spain	Variety Show	5	15:07	25	6.7%	19.6%
NEWS I	Spain	News	365	14:10	54	6.5%	24.8%

Top 10 Single Programmes		Genre	Date	Start.Time	Length (m.)	Audience	Share
THE MASK	USA	Movie	07/03	21:36	113	17.9%	38.5%
ANDALUCIA GALA	Spain	Variety Show	28/02	21:29	246	17.3%	50.0%
FBAL BARCELONA-VALENCIA		Sport	18/02	21:32	109	16.7%	33.7%
FBAL R. MADRID-VILLARREAL		Sport	21/01	21:02	112	16.3%	33.4%
FBAL R. MADRID-SANTANDER		Sport	23/02	21:33	108	15.2%	31.1%
FBAL R. MADRID-VALENCIA		Sport	16/06	21:32	112	13.4%	36.3%
THE GREAT HUMOR GALA	Spain	Variety Show	28/12	21:36	229	13.4%	35.9%
FBAL ALAVES-R. MADRID		Sport	21/12	21:32	111	13.4%	27.6%
FBAL AT. MADRID-CORUÑA		Sport	08/06	21:30	109	12.5%	30.8%
FBAL AT. MADRID-R. SOCIEDAD		Sport	02/02	21:32	107	12.5%	26.6%

Source: SOFRES, A.M./Adults +16-Andalucia

CANAL 2 ANDALUCIA							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE TRAMP	Spain	Variety Show	8	22:28	94	1.5%	3.3%
GOAL TO GOAL	Spain	Sport Magazine	47	22:02	104	0.9%	2.5%
NED & STACEY	USA	Ser.-Daily Soap	60	15:57	21	0.7%	1.9%
NATIONAL GEOGRAPHIC	USA	Documentary	14	19:10	53	0.7%	2.3%
SOUTH BAND	Spain	Children	589	15:37	134	0.6%	2.4%
THE NANNY	USA	Sitcom	76	16:04	22	0.6%	1.7%
THE ALIEN EMPIRE	UK	Documentary	12	22:45	28	0.6%	1.9%
J.COUSTEAU UNKOWN COUNTRIES	France	Documentary	35	17:30	48	0.5%	1.7%
WILD LIFE	UK	Documentary	53	17:02	29	0.5%	1.9%
SEVEN DAYS	Spain	Magazine	36	21:02	27	0.5%	1.5%

Top 10 Single Programmes		Genre	Date	Start.Time	Length (m.)	Audience	Share
THE LAST OF THE MOHICAN	USA	Movie	30/04	23:00	107	2.8%	8.0%
FBAL CATAGONOVA-CORDOBA		Sport	30/06	23:07	13	2.5%	6.7%
FBAL BARCELONA-GALATASARAY		Sport	12/01	20:31	112	2.3%	5.2%
TORMENT	Spain	Movie	27/10	22:30	84	2.3%	4.9%
KILIMANJARO KILLERS	USA	Movie	02/08	22:46	87	2.2%	7.5%
PHOENIX'S FLY	USA	Movie	20/11	22:11	136	2.2%	5.6%
UNDAMNED HEART	USA	Movie	19/11	22:58	98	2.1%	5.9%
LIKE A FLASED PAST	Spain	Movie	27/12	22:21	101	2.1%	5.7%
FBAL NETHERLANDS-PORTUGAL		Sport	10/02	20:31	107	2.1%	5.1%
THE POWERFUL INFL. OF THE MOON	Spain	Movie	24/12	22:29	102	2.1%	4.8%

Source: SOFRES, A.M./Adults +16-Andalucia

TV 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
PLATS BRUTS	Spain	Sitcom	30	21:37	33	15.8%	34.7%
MALALTS DE TELE	Spain	Ser.-Daily Soap	32	21:34	122	14.2%	30.3%
BELLVITGE HOSPITAL	Spain	Magazine	13	21:30	36	13.5%	28.3%
THE WEATHER	Spain	News	114	21:16	5	10.9%	31.0%
PRIVATE LIFES	Spain	Magazine	7	21:35	32	10.5%	22.3%
LABERINT D'OMBRES	Spain	Ser.-Daily Soap	215	15:50	40	10.4%	34.2%
MEMORIA DELS CARGOLS	Spain	Sitcom	26	22:14	61	10.3%	21.5%
CATALUNYA FROM THE AIR	Spain	Documentary	23	21:07	35	10.3%	26.7%
COOKINGS	Spain	Magazine	255	15:32	8	10.2%	32.2%
OUT FOR HOLIDAYS	Spain	Magazine	50	20:25	6	10.1%	34.3%

Top 10 Single Programmes		Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL BARCELONA-DREAM TEAM		Sport	10/03	23:23	10	34.6%	71.4%
FBAL BARCELONA-DREAM TEAM		Sport	10/03	21:34	109	34.3%	65.2%
FBAL BARCELONA-DREAM TEAM		Sport	10/03	20:57	36	28.1%	58.5%
FBAL BARCELONA-BRASIL		Sport	28/04	21:11	113	27.6%	56.1%
FBAL BARCELONA-VALENCIA		Sport	27/02	21:02	110	27.2%	61.4%
FBAL BARCELONA-VALENCIA		Sport	18/02	21:32	109	26.4%	53.3%
FBAL BARCELONA-ATH.BILBAO		Sport	09/01	21:05	112	26.2%	53.3%
FBAL CL		Sport	26/05	20:16	161	25.6%	59.6%
FBAL BARCELONA-SELECCIO LLIGA		Sport	27/01	21:52	105	23.9%	52.1%
FBAL SEVILLA-BARCELONA		Sport	11/12	21:04	114	23.5%	52.2%

Source: SOFRES, A.M./Adults +16-Cataluña

CANAL 33							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
GOAL TO GOAL	Spain	Sport Magazine	40	21:38	179	4.3%	11.3%
THALASSA	Spain	Documentary	11	22:28	41	2.5%	5.6%
LABERINT D'OMBRES	Spain	Ser.-Daily Soap	85	19:55	85	2.5%	7.8%
BOLA DE DRAC GT	Japan	Cartoon	133	14:00	24	2.3%	9.6%
BEYOND YEAR 2000	Australia	Documentary	31	21:44	33	2.1%	4.9%
AGORA	Spain	Talk Show	9	22:23	114	1.9%	4.6%
MILLENNIUM PRESENTATION	Spain	Docu. Soap	35	22:17	210	1.9%	6.6%
BOLA DE DRAC	Japan	Cartoon	109	14:07	29	1.8%	7.8%
PARAL.LEL	Spain	Talk Show	19	22:27	101	1.8%	4.4%
AD	Spain	Magazine	28	21:28	29	1.7%	4.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL R. MADRID-SANTANDER	Spain	Sport	23/02	21:33	108	9.2%	18.5%
FBAL SEVILLA-VILLARREAL		Sport	30/06	21:49	112	8.7%	20.1%
FBAL MALLORCA-NK VARTEKS		Sport	18/03	20:29	111	7.2%	17.2%
BBAL BARCELONA-ESTUDIANTES		Sport	31/03	20:01	101	6.4%	20.1%
BBAL BARCELONA-ESTUDIANTES		Sport	31/03	21:42	18	6.0%	14.2%
BBAL BARCELONA-DUCATO SIENA		Sport	17/02	20:32	95	5.3%	12.4%
FBAL LLEIDA-ESPANYOL		Sport	11/05	20:33	114	5.2%	13.6%
FBAL NK VARTEKS-MALLORCA		Sport	04/03	20:30	108	5.1%	12.2%
TRIBUTE CONCERT C. SABATER		Music	27/04	20:59	154	5.0%	10.7%
LORD OF THE DANCE	UK	Music	05/04	22:00	64	4.9%	10.2%

Source: SOfRES, A.M./Adults +16-Cataluña

TVM							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TOMBOLA	Spain	Talk Show	53	21:34	251	8.8%	28.4%
FUN PEOPLE	Spain	Game Show	48	21:46	140	8.4%	20.6%
MEGAHIT PRESENTATION	Spain	Magazine	26	21:55	17	8.3%	22.4%
MACUMBA TEVE	Spain	Comedy Show	6	21:42	153	6.7%	15.3%
FIRST WAVE	USA	Ser.-Action	30	22:08	57	6.3%	14.4%
STARGATE	USA	Ser.-Action	24	22:03	55	6.0%	15.8%
ONCE UPON A TIME TVM	Spain	Documentary	8	21:34	20	6.0%	15.2%
MAMMA MIA	Spain	Game Show	44	15:34	75	5.9%	24.3%
CON T DE TARDE	Spain	Talk Show	201	15:38	135	5.9%	20.8%
FOOTBALL IS FOOTBALL	Spain	Sport Magazine	48	20:15	141	5.9%	19.0%

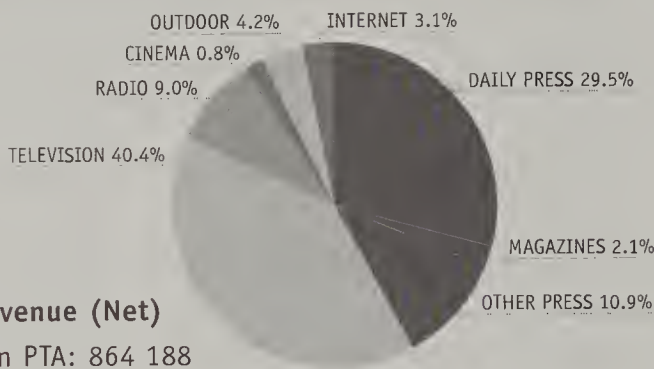
Top 10 Single Programmes		Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL RAYO VALLECANO-R. MADRID		Sport	06/11	21:01	109	23.7%	62.5%
FBAL R. MADRID-AT. MADRID		Sport	30/10	21:02	105	22.3%	66.3%
FBAL AT. MADRID-R. MADRID		Sport	12/06	21:01	113	20.0%	61.3%
FBAL VILLARREAL-R .MADRID		Sport	30/01	21:03	110	19.8%	51.5%
FBAL R. MADRID-VILLARREAL		Sport	21/01	21:02	112	19.8%	41.9%
FBAL R. MADRID-VALENCIA		Sport	16/06	21:33	112	19.2%	44.1%
FBAL ALAVES-R. MADRID		Sport	21/12	21:32	111	18.8%	37.2%
FBAL BARCELONA-VALENCIA		Sport	27/02	21:02	110	18.8%	45.9%
FBAL R. SOCIEDAD-R. MADRID		Sport	08/05	21:02	116	17.9%	55.0%
ABOUT HENRY	USA	Movie	28/02	22:01	121	17.8%	37.8%

Source: SOfRES, A.M./Adults +16-Madrid

Advertising Expenditure

ADVERTISING FIGURES		GROSS*	NET
Total adspend	(in million PTA)	1 454 108	864 188
Total adspend	(in million USD)	8 780	5 218
Total adspend	(in million EUR)	8 739	5 194
TV adspend	(in million PTA)	966 446	349 355
TV adspend	(in million USD)	5 903	2 133
TV adspend	(in million EUR)	5 835	2 100
TV adspend	in % of GDP	1.05	0.38
TV adspend	per capita (USD)	143.8	52.0

SHARE OF MEDIA EXPENDITURE	NET
Category: Market Share in %	



Total Revenue (Net)

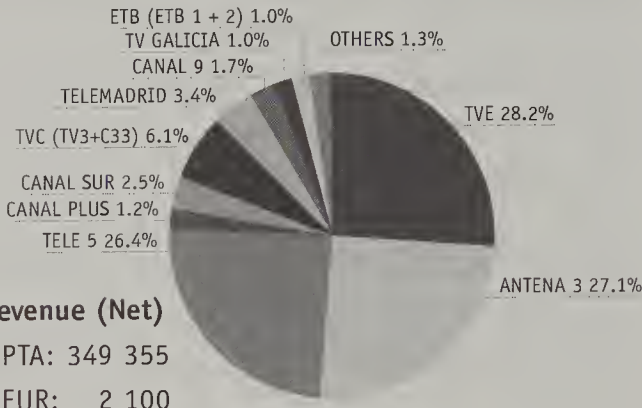
in million PTA: 864 188

in million EUR: 5 194

TV ADVERTISING STATISTICS	
Total number of spots broadcast	1 870 241
Average spot length (in sec.)	26.1
Total number of advertisers	38 591
Number of TV advertisers	4 195
Total number of advertised products	86 026
Number products advertised on TV	10 529

Source: 1999 Annuary Infoadex – RMB España Multimedia
*Conventional Media, without Internet

SHARE OF TV ADVERTISING REVENUE	NET
Channels: Advertising Market Share in %	



Total TV Revenue (Net)

in million PTA: 349 355

in million EUR: 2 100

Source: 1999 Annuary Infoadex – RMB España Multimedia

TOP 10 ADVERTISING FIGURES (NET)				
TV Advertising Sectors	5 Media*	Television	Spent in TV	Share of TV Expenditure
FOOD	60 828	52 722	86.7%	15.1%
PERSONAL CARE & PHARMACY	72 303	47 297	65.4%	13.5%
CULTURE/EDUCATION/MEDIA	121 933	44 715	36.7%	12.8%
AUTOMOTIVE	92 852	44 342	47.8%	12.7%
OFF. EQUIP./COMP./COMMUN.	73 659	29 613	40.2%	8.5%
DRINKS	44 331	25 103	56.6%	7.2%
RETAIL	51 651	17 151	33.2%	4.9%
WASHING PRODUCTS	17 937	17 086	95.3%	4.9%
PUBLIC & PRIVATE SERVICES	53 793	14 277	26.5%	4.1%
FINANCE & INSURANCE	36 051	14 037	38.9%	4.0%
OTHERS	211 678	43 012	20.3%	12.3%
TV Advertisers				
PROCTER & GAMBLE	10 849	9 947	91.7%	2.8%
DANONE	6 889	6 530	94.8%	1.9%
TELEFONICA SERV. MOVILES	13 425	5 494	40.9%	1.6%
VOLKSWAGEN-AUDI ESPAÑA	9 301	5 416	58.2%	1.6%
TELEFONICA SDAD.OPERA.SERV.TELEC.	11 585	5 324	46.0%	1.5%
ARBORA & AUSONIA	5 424	5 066	93.4%	1.5%
CIA. COCA COLA DE ESPAÑA	6 392	5 062	79.2%	1.4%
NESTLE ESPAÑA	5 914	4 958	83.8%	1.4%
HENKEL IBERICA	4 891	4 820	98.6%	1.4%
FASA RENAULT	8 481	4 712	55.6%	1.3%
OTHERS	753 867	292 026	38.7%	83.6%
Total (in million PTA)	837 017	349 355	41.7%	100.0%
Total (in million EUR)	5 031	2 100	41.7%	100.0%

Source: 1999 Annuary Infoadex – RMB España Multimedia

*Press, TV, Radio, Cinema and Outdoor

Sweden

On April 1 1999, Sweden followed the United Kingdom and took the first big step into the world of digital terrestrial television, DTT. After some years of political turmoil, following the traditional left-wing scale – with the governing social democrats the strongest supporters and advocates of DTT, even officially confirming that one major reason for their strong engagement is to retain some state control over television, while still possible – the actual launch became more a whimper than a bang. Only a handful of the original licencees (SVT with its two channels and its new SVT24 news service, Canal+ and fledgling business & documentary niche channel TV8) turned up.

Almost one year later, all 18 licencees (except some regional services) have finally become fully operational on what has gradually been extended to four multiplexes. TV4 was the first to fall in the ranks, then – one by one – the others have followed: Canal+ now has space for all its three Nordic services while rival premium pay operation TV1000, owned by expanding Swedish media empire Modern Times Group, MTG, can only offer one. On the other hand, MTG has a whole multiplex of its own, presently containing TV3, youth & music-focused ZTV, ViaSat Sport, and TV8 – which was acquired by MTG in the autumn of 1999. When TV3 finally decided to go on the air, at the end of January 2000, Kanal 5 did, too. Two private, independent channels have been created purposely for the DTT project: K-World, a learning channel, and interactive eTV, initially limited to CD and video sales, and weather reports.

So far, the people of Sweden have not taken DTT to their hearts: for many months the set top boxes sold could be counted in three digit figures only, but after a subventioned box rental system had been organised by state-controlled national transmitter system owner/operator Teracom and its affiliate Boxer Acess, the situation has somewhat brightened. The target is the 35% of the population not yet reached by DTH or cable.

The only leading cable operator, Telia and its Com.hem (about to be sold out) yet to have gone for digitalisation (already in late 1997) has had a similarly disappointing development: so far only some 65 000 of Com.hem’s total of 1.3 million households have responded to the digital gospel. In the late spring of 2000, MTG made a complete about-turn and announced a rapid march into digitality for all its growing number of TV operations, as for Viasat’s DTH platform Viasat, with over a million subscribers in Scandinavia. Canal Digital, the joint Nordic DTH venture by Canal+ and Norwegian Telenor, has so far been the most successful in the digital race: by mid 2000 around 100.000 digital DTH customers were recruited.

On the ground, TV4 still retains its position as Sweden’s most watched station, with a 27% average annual share, with SVT2 closely behind with 25%. SVT1 dropped to 22%. During periods in the spring of 2000 TV4 could claim “biggest station” status every day of the week: the prestigious weekend ratings increased again, after some

year’s of losing out to SVT. Advertising sales and overall profit have followed the general Swedish economical euphoria. Due to active and decisive moves into IT, new media and interactivity by the new MD, Thorbjörn Larsson, the TV4 share has regained the confidence of the booming Stockholm stock exchange. 1999 was the year when the total amount spent on television advertising for the very first time surpassed the figure of licence fee money allocated by the Swedish parliament to SVT: SEK 3,2 billion (£ 245 million). This gap is expected to widen.

Among the other private television operators, particularly TV3 has had another successful year (as the whole of MTG, where years of red figures ended in 1999; from its floating in 1997 the MTG share has almost tenfolded its value) with an all-time high both in ratings and advertising sales. Sports (ice-hockey and football) are still the main attractions, but the station has also made hard efforts to break the TV4-SVT weekend dominance, mostly by heavy investments in spectacular format imports.

Kanal5, SBS’s Swedish arm, has seen a number of years losing viewers, mainly to TV3. But from autumn 2000, the station seems firmly decided to fight back. There are two main weapons, both domestic: “Big Brother” and a local version of “Hotel Caesar”, a giant soap-project (over 900 half hours episodes), created by Swedes for Norwegian TV2. From the mid 1990’s, a clear change of priorities has seen a major increase of domestic fiction programming, with a particular focus on soaps. And 2000 will also go down in history as the year when Sweden (and Scandinavia, as all major production houses in the territory are working in all three countries) actually started to export programmes, and above all formats, even to the fastidious U.S. market.

Running premium pay TV operations in the Nordic territories is still a matter of losing big money: the veteran, Canal+, today running 3 channels, Canal+, C+ Yellow and C+ Blue, and MTG-owned TV1000 (with parallel channel TV1000 Cinema) have together spent billions of krona in marketing wars. Subscription figures are kept like secrets of state, and never given out per country, merger talks are constant and regular, still to no avail.

Sweden

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General Data

COUNTRY	
Land area (km ²)	449 964
Total population	8 861 426
Number of households	4 095 961
Average household size	2.2
In % of households equipped	
Phone	99.0
Mobile telephone subscribers*	51.1
PC's**	51.0
Internet access	56.0
Internet users***	55.4

Source: SCB

*in % of Population, in 1998; EITO 2000
European Media Watch, *MMXI Nordic

TV OVERVIEW	
Total number of TV households (TVHH)	4 030 000
In % of all households	98.4
Numbers of channels received by 70% of the population	n.a.
TV License-Fee cost per year	SEK 1 644.-/EUR 195.-

TV EQUIPMENT	
	in % of TVHH
Colour TV	100.0
Multiset (homes with more than 1 TV set)	57.0
VCR	87.0
Teletext	84.0
Remote control	97.0

Sources: SCT, MMS

ECONOMICS	
GDP in million SEK (at current prices)	1 972 088
GDP per capita in SEK (at current prices)	224 000
Inflation rate in 1999 (in %)	1.2
Value of SEK in Euro (EUR)*	1 EUR = 8.56 SEK
Value of SEK in US-Dollar (USD)*	1 USD = 8.52 SEK

Source: SCB

*December 1999

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	65.0
	connected	43.0
Satellite	private dish/DTH	19.0
	collective dish/SMATV	6.0
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
SVT 1	1956	T	100%	Swedish	120	Generalist	L-F, Spon.	n.a.
SVT 2	1969	T	100%	Swedish	120	Generalist	L-F, Spon.	n.a.
SVT 24	1999	S	n.a.	Swedish	168	News	L-F	n.a.
SVT EUROPE	1997	S	n.a.	Swedish	168	Generalist	L-F	n.a.

Source: SVT, Sweden

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TV 3	1987	C, S	62.0%	Swedish	130	Generalist	Adv.	Airtime
TV 4	1990	T	99.0%	Swedish	130	Generalist	Adv., Spon.	n.a.
KANAL 5	1989	C, S	50.0%	Swedish	56	Generalist	Adv.	In-house
TV 6	1994	C, S	38.0%	Swedish	25	Action/Nature	Adv.	Airtime
TV 8	1997	C, S	18.0%	Swedish	n.a.	Econ. News	Adv.	n.a.
ZTV	1995	C, S	44.0%	Swedish	n.a.	Youth	Adv.	n.a.
TV 21	n.a.	C, S	6.0%	Swedish	n.a.	Entertainment	Adv.	n.a.
TVG	n.a.	C, S	n.a.	Swedish	n.a.	Teleshopping	n.a.	n.a.

Source: SVT, Sweden

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech.Pen.	Language	Programming	Revenue
ANIMAL PLANET	Private	C, S	n.a.	English	Documentaries	Adv.
BBC PRIME	Public	C, S	n.a.	Engl./sub. Swedish	Generalist	L-F
DISCOVERY	Private	C, S	15%	Engl./sub. Swedish	Documentaries	Adv.
SKY NEWS	Private	C, S	10%	English	News	Adv.
EUROSPORT	Private	C, S	41%	Engl./sub. Swedish	Sport	Adv.
MTV EUROPE	Private	C, S	n.a.	English	Music	Adv.
NICKELODEON	Private	C, S	n.a.	Engl./sub. Swedish	Children	Adv.
TCC	Private	C, S	n.a.	Engl./sub. Swedish	Children	Adv.
CNN INT.	Private	C, S	20%	English	News	Adv.
BBC WORLD	Private	S	n.a.	English	News	Adv.
TNT/CARTOON	Private	S	n.a.	English	Old movies/Cartoons	Adv.
DEUTSCHE WELLE	Public	S	n.a.	German	Generalist	L-F
3 SAT	Public	S	n.a.	German	Generalist	L-F
TVE INT.	Public	S	n.a.	Spanish	Generalist	L-F, Adv.
TV 5 EUROPE	Public	C, S	11%	French	News	L-F, Spon.
VH-1	Private	S	n.a.	English	Music	Adv.
CNBC	Private	C, S	n.a.	English	News	Adv.
EURONEWS	Private	C, S	n.a.	English	News	Adv.
FOX KIDS	Private	C, S	n.a.	Engl./sub. Swedish	Children	Adv.
HALLMARK	Private	C, S	n.a.	Engl./sub. Swedish	TV Mowie, Children	Adv.
MUZZIK	Private	C, S	n.a.	French	Music	Adv.

Source: SVT, Sweden

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
TV 3 DENMARK	Private	C, S	n.a.	Danish	Generalist	Adv.
TV 3 NORWAY	Private	C, S	n.a.	Norwegian	Generalist	Adv.
TV NORGE	Private	C, S	n.a.	Norwegian	Generalist	Adv.
TV DENMARK	Private	C, S	n.a.	Danish	Generalist	Adv.
YLE 1, 2	Public	C, S	n.a.	Norwegian	Generalist	Adv.
TV FINLAND	Public	C, S	n.a.	Finish	Generalist	L-F
MTV 3	Private	C	n.a.	Finish	Generalist	Adv.
DR 1, 2	Public	T	n.a.	Danish	Generalist	L-F
TV 2	Public	T	n.a.	Danish	Generalist	L-F, Adv.
NRK 1, 2	Public	T	n.a.	Norwegian	Generalist	L-F, Spon.
TV 2	Private	T	n.a.	Norwegian	Generalist	Adv.
PRO 7	Private	S	n.a.	German	Generalist	Adv.
RTL	Private	S	n.a.	German	Generalist	Adv.
RTL 2	Private	S	n.a.	German	Generalist	Adv.
SAT 1	Private	S	n.a.	German	Generalist	Adv.
VOX	Private	S	n.a.	German	Generalist	Adv.
RAI UNO	Public	S	n.a.	Italian	Generalist	L-F, Adv.
ZDF	Public	C, S	n.a.	German	Generalist	L-F, Adv.

Source: SVT, Sweden

PAY TV ANALOG								
Channels	Launch	Diff.	Subscribers	Language	h/week	Programming	Cost/month	Revenue
CANAL +	1985	C, S	n.a.	Orig./sub.	168	Movie, Sport	n.a.	Sub.
CANAL + GUL	1995	C, S	n.a.	Orig./sub.	168	Movie, Sport	n.a.	Sub.
CANAL + BLA	1999	C, S	n.a.	Orig./sub.	95	Movie, Sport	n.a.	Sub.
TV 1000	1989	C, S	n.a.	Orig./sub.	168	Movie, Sport	n.a.	Sub.
TV 1000 CINEMA	1995	C, S	n.a.	Orig./sub.	168	Movie, Sport	n.a.	Sub.
BIO HENNA	1996	C	n.a.	Orig./sub.	168	Movie	n.a.	Pay p. View

Source: SVT, Sweden

DIGITAL PACKAGES									
Channels	Launch	Diff.	Decoder	Subscr.	Language	No.of Ch.	Revenue	Cost/month	Sales H.
CANAL DIGITAL	1997	S	Nokia, Philips	100 000	Orig./Swedish	43	PPV	SEK 299.–	n.a.
VIASAT	2000	S	various	n.a.	Orig./Swedish	n.a.	n.a.	n.a.	n.a.

Source: SVT, Sweden

Viewing Patterns

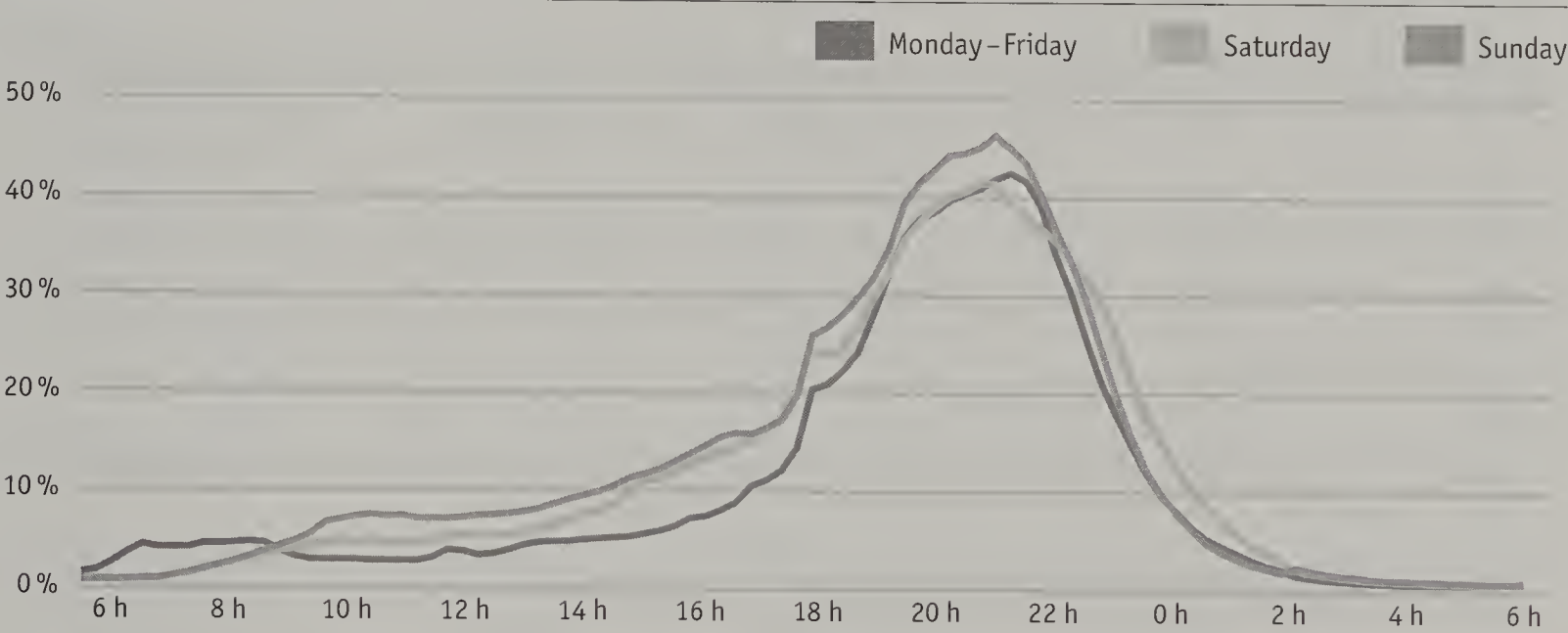
AUDIENCE MEASUREMENT

Name of the Service and Institute:	MMS Mediamätning i Skandinavien AB
Panel/Sampling Size	1 000 households, 2 200 ind.
Instrument used (people-meter, telefon, face-to-face)	People-meter (AC Nielsen's Eurometer)
Population size in 000	
Individuals 3+	8 409
Adults 15+	7 063
Main Purchase Responsibles Women 15+	3 603
Young Adults 15-34	2 241
Children 3-14	1 346

Source: MMS, Sweden

TOTAL TV RATING 1999

Adults Age: 15+

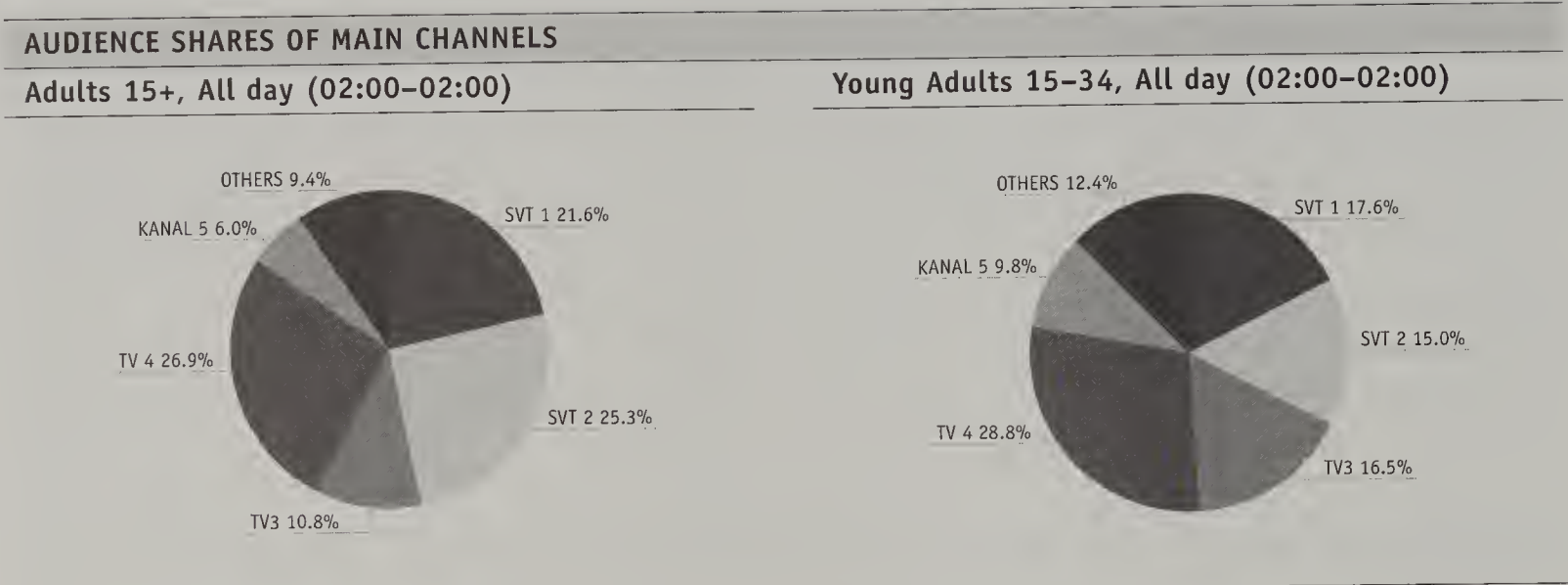


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)

	Adults 15+			Children 3-14			Young Adults 15-34			Women 15+		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	76	77	77	n.a.	n.a.	73	72	72	70	74	76	76
Viewing time per Viewer	198	201	199	n.a.	n.a.	128	170	169	174	197	201	202
Viewing time per Individual	149	154	152	n.a.	n.a.	93	122	122	122	146	153	153

Source: MMS, Sweden

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00								
	Adults 15+		Young Adults 15–34		Children 3–14		Main Purchase Responsibles	
	1998	1999	1998	1999	1998	1999	1998	1999
SVT 1	21.2%	20.3%	17.7%	17.6%	n.a.	32.9%	n.a.	19.5%
SVT 2	27.6%	26.8%	14.8%	15.0%	n.a.	12.0%	n.a.	27.9%
TV 3	9.6%	10.5%	15.7%	16.5%	n.a.	14.0%	n.a.	10.7%
TV 4	26.8%	27.3%	29.3%	28.8%	n.a.	23.6%	n.a.	28.7%
KANAL 5	6.3%	6.0%	9.9%	9.8%	n.a.	6.0%	n.a.	6.2%
OTHERS	8.5%	9.2%	12.6%	12.4%	n.a.	11.7%	n.a.	7.2%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 15+		Young Adults 15–34		Children 3–14		Main Purchase Responsibles	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6–19h	19–23h	6–19h	19–23h	6–19h	19–23h	6–19h	19–23h
SVT 1	19.1%	21.7%	17.9%	22.2%	37.2%	28.6%	17.3%	21.0%
SVT 2	24.2%	30.7%	11.2%	29.7%	7.3%	18.0%	24.7%	31.7%
TV 3	10.8%	9.3%	17.3%	9.4%	16.2%	10.8%	11.5%	9.2%
TV 4	28.9%	26.3%	28.5%	26.6%	18.1%	30.4%	31.5%	27.2%
KANAL 5	6.0%	5.3%	9.6%	5.3%	6.8%	4.8%	6.5%	5.4%
OTHERS	11.2%	6.9%	15.7%	7.0%	14.7%	7.6%	8.7%	5.7%

Source: MMS, Sweden

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
FROM ALL OF US TO ALL OF YOU	USA	SVT 1	Cartoon	15:00	24/12	46.4%	91.3%
GR. PRIX (NATIONAL CONTEST) 99	Sweden	SVT 2	Variety Show	21:00	27/02	41.5%	83.1%
SÅ SKA DET LÅTA	Sweden	SVT 2	Music	20:01	10/12	40.2%	77.2%
REUTER & SKOOG	Sweden	SVT 2	Comedy Show	20:01	05/12	39.8%	70.0%
GR. PRIX EUROV. DE LA CHANSON 99		SVT 2	Variety Show	21:00	29/05	36.8%	81.5%
PÅ SPÅRET	Sweden	SVT 2	Game Show	20:01	19/12	34.9%	65.7%
SVENSSON SVENSSON-FILM	Sweden	SVT 2	Movie	20:03	25/12	32.3%	67.2%
EXPEDITION: ROBINSON	Sweden	SVT 2	Docu. Soap	20:00	18/12	32.3%	55.6%
HAVE WE GOT NEWS FOR YOU	Sweden	SVT 2	Sitcom	20:00	09/01	29.4%	61.0%
TACK FÖR ALLA SKRATT STELLAN	Sweden	SVT 2	Sitcom	20:01	24/11	29.3%	58.6%
JÄVLA KAJSA	Sweden	SVT 2	Sitcom	20:02	14/03	29.1%	55.7%
NYHETERNA OCH VÄDRET	Sweden	TV 4	News	22:00	14/02	28.4%	51.2%
RAPPORT	Sweden	SVT 2	News	19:30	01/01	27.6%	67.4%
HELT APROPÅ-THE PRIZE	Sweden	SVT 2	Sitcom	20:00	28/02	27.3%	58.3%
AGNETAS NYÅRSKARAMELLER	Sweden	TV 4	Variety Show	20:02	23/12	26.9%	51.4%
ANNA HOLT	Sweden	SVT 2	Series-Crime	21:02	12/11	26.3%	51.0%
UPPESITTARKVÄLL	Sweden	TV 4	Variety Show	22:17	07/03	26.1%	56.8%
SUNES SOMMAR	Sweden	SVT 2	Movie	20:00	09/01	25.9%	62.6%
SPORTSPEGELN	Sweden	SVT 2	Sport Magazine	20:30	05/12	25.5%	47.7%
SKI DOWNHILL W. CHMP		SVT 1	Sport	18:55	03/02	24.7%	54.9%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
SVENSSON SVENSSON	Sweden	SVT 2	20:03	17/11	32.3%	67.2%
SUNES SOMMAR	Sweden	SVT 2	20:00	28/10	25.9%	62.6%
ADAM OCH EVA	Sweden	SVT 2	21:03	18/11	24.7%	50.8%
CROCODILE DUNDEE II	Australia	TV 4	21:04	04/08	23.9%	53.0%
SÄLLSKAPSRESAN	Sweden	SVT 2	21:16	16/11	23.9%	60.7%
CROCODILE DUNDEE II	Australia	TV 4	22:17	04/08	22.8%	59.6%
BADJÄVLAR	Sweden	SVT 2	20:01	20/02	22.7%	49.4%
GÖTA KANAL	Sweden	SVT 2	20:01	21/10	22.6%	55.2%
BECK-MANNEN MED IKONERNA	Sweden	TV 4	21:02	11/11	22.1%	59.6%
BECK-MANNEN MED IKONERNA	Sweden	TV 4	22:18	11/11	22.1%	41.1%

TOP 10 SPORT EVENTS					
Title	Channel	Start. Time	Date	Audience	Share
SPORTSPEGELN	SVT 2	20:30	28/10	25.5%	47.7%
SKI DOWNHILL W. CHMP	SVT 1	18:55	03/02	24.7%	54.9%
ATHLETICS W. CHMP	TV 4	20:30	11/10	24.5%	54.4%
SKIING	SVT 2	10:49	14/05	24.1%	75.0%
ICEHOCK	TV 4	19:08	02/09	24.1%	50.3%
HBAL W.CHMP	TV 4	21:20	17/03	22.9%	54.6%
SPORTSPEGELN	SVT 2	20:30	21/05	22.4%	43.8%
ICEHOCK	TV 4	19:49	02/09	21.7%	42.4%
ATHLETICS W. CHMP	SVT 2	19:59	14/10	21.4%	48.3%
SPORTSPEGELN	SVT 2	20:30	22/10	20.8%	45.1%

Source: MMS, Sweden

Top Programmes Channel by Channel

SVT 1						
Top 10 Recurrent Programmes	Land	Genre	Start.Time	Length (m.)	Audience	Share
SKI DOWNHILL W. CHMP	Sweden	Sport	18:55	64	24.7%	54.9%
HEM TILL BYN		Series–Drama	20:01	49	24.0%	49.8%
REDERIET		Soap Drama	20:01	43	23.6%	57.3%
A-EKONOMI		News	21:31	10	22.6%	53.2%
ALLSÅNG PÅ SKANSEN		Music	20:00	59	22.4%	62.4%
AKTUELLT		News	21:00	31	21.4%	49.0%
SÖNDAGSÖPPET		Variety Show	18:32	88	21.3%	53.6%
SPORTNYTT		Sport	21:40	16	20.5%	52.8%
RHAPSODY IN ROCK		Music	20:01	58	20.0%	45.1%
NATIONALDAGEN	Sweden	Magazine	20:00	60	20.0%	43.5%

Note: Highest rated episode for a program which aired four times or more

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FROM ALL OF US TO ALL OF YOU	USA	Cartoon	24/12	15.00	64	46.4%	91.3%
NYTT MILLENIUM	Sweden	Variety Show	31/12	24.00	20	21.7%	26.6%
KUNGAFAMILJEN 1998	Sweden	Documentary	01/01	19:00	59	20.6%	46.4%
SÅNT ÄR LIVET	Sweden	Variety Show	19/08	20:00	59	20.0%	49.7%
ROYAL FAMILY	Sweden	Sport	07/03	7:30	210	19.7%	88.1%
BROARNA I MADISON COUNTY	Sweden	Movie	08/01	22:01	129	17.6%	56.3%
PENGARNA GÖR MANNEN	Sweden	Movie	27/12	20:00	60	17.5%	38.5%
BRIDGES OVER MADISON COUNTY	USA	Documentary	03/05	20:00	59	17.4%	42.5%
KAN DU VISSLA JOHANNA	Sweden	Variety Show	24/12	16:05	54	16.8%	64.3%
NATIONALDAGEN	Sweden	Magazine	06/06	19:00	60	16.4%	43.8%

Source: MMS, Sweden

STV 2						
Top 10 Recurrent Programmes	Land	Genre	Start.Time	Length (m.)	Audience	Share
SÅ SKA DET LÅTA	Sweden	Music	20:01	58	40.2%	77.2%
REUTER & SKOOG	Sweden	Comedy Show	20:01	28	39.8%	70.0%
PÅ SPÅRET	Sweden	Game Show	20:01	59	34.9%	65.7%
EXPEDITION ROBINSON	Sweden	Docu. Soap	20:00	59	32.3%	55.6%
SNACKA OM NYHETER	Sweden	Comedy Show	20:00	29	29.4%	61.0%
JÄVLA KAJSA	Sweden	Sitcom	20:02	26	29.1%	55.7%
RAPPORT	Sweden	News	19:30	30	27.6%	67.4%
ANNA HOLT	Sweden	Series–Crime	21:02	43	26.3%	51.0%
SPORTSPEGELN	Sweden	Sport Magazine	20:30	45	25.5%	47.7%
PACKAT OCH KLART	Sweden	Variety Show	21:16	29	24.1%	51.8%

Note: Highest rated episode for a program which aired four times or more

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GRAND PRIX (NATIONAL CONT.) 99	Sweden	Variety Show	27/02	21.00	125	41.5%	83.1%
GRAND PRIX EUROV. DE LA CH. 99		Variety Show	29/05	21.00	194	36.8%	81.5%
SVENSSON, SVENSSON		Sitcom	25/12	20:03	80	32.3%	67.2%
TACK FÖR ALLA SKRATT, STELLAN		Sitcom	14/03	20:01	29	29.3%	58.6%
HELT APROPÅ		Comedy Show	28/02	20:00	26	27.3%	58.3%
SUNES SOMMAR		Movie	09/01	20.00	89	25.9%	62.6%
ADAM & EVA		Movie	26/12	21:03	94	24.7%	50.8%
VASALOPET		Sport	07/03	10:49	131	24.1%	75.0%
JAKTEN PÅ EN MÖRDARE		Series–Crime	09/01	21:31	87	24.0%	61.9%
SÄLLSKAPSRESAN	Sweden	Movie	24/12	21:16	103	23.9%	60.7%

Source: MMS, Sweden

TV 3						
Top 10 Recurrent Programmes	Land	Genre	Start.Time	Length (m.)	Audience	Share
DEN STORA KLASSFESTEN	Sweden	Variety Show	21:02	90	8.6%	20.6%
EMERGENCY ROOM	USA	Series–Medical	21:02	55	7.3%	15.7%
JAKTEN PÅ ÖKENGULDET	Sweden	Game Show	21:05	89	6.9%	16.4%
EFTERLYST	Sweden	Magazine	21:00	59	6.4%	14.8%
BLÅSNINGEN	Sweden	Comedy Show	21:32	59	6.0%	14.9%
FOLKHEMMET	Sweden	Documentary	22:01	28	6.0%	19.0%
GUINNESS REKORD TV	USA	Variety Show	20:02	55	5.8%	13.5%
PÅ HEDER & SAMVETE	USA	Series–Action	20:02	58	5.6%	12.1%
VITA LÖGNER	Sweden	Ser.–Daily soap	19:01	29	5.2%	15.2%
KLIPPT OCH KLART	Sweden	Variety Show	21:47	14	5.0%	14.0%

Note: Highest rated episode for a program which aired four times or more

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ICE HOCKEY W.CHMP SWE–FIN		Sport	13/05	20.00	155	18.2%	41.3%
ICE HOCKEY W.CHMP SWE–RUSSIA		Sport	09/05	18.55	90	16.1%	35.6%
FBAL EU CHMP ENG–SWE		Sport	06/05	16:00	119	13.4%	58.3%
ICE HOCKEY W.CHMP SWE–TJE		Sport	10/05	20:00	148	13.3%	31.3%
ICE HOCKEY W.CHMP SLOV–SWE		Sport	07/05	20:48	94	12.9%	28.3%
ICE HOCKEY W.CHMP SWE–RYS		Sport	09/05	18:00	38	12.3%	38.4%
FBAL CHMP LEAGUE AIK–BARCEL.		Sport	14/09	21:41	59	12.2%	33.1%
FBAL CHMP LEAGUE AIK–BARCEL.		Sport	14/09	20:45	48	11.9%	25.9%
FBAL EURO 2000 QUAL.		Sport	31/03	20:00	155	11.9%	27.7%
CON AIR	USA	Movie	28/11	21:01	123	11.8%	30.1%

Source: MMS, Sweden

TV 4						
Top 10 Recurrent Programmes	Land	Genre	Start.Time	Length (m.)	Audience	Share
CNYHETERNA OCH VÄDRET	Sweden	News	22:00	10	28.4%	51.2%
UPPESITTARKVÄLL	n.a.	Variety Show	22:17	73	26.1%	56.8%
FRIIDROTTS VM		Sport	20:30	55	24.5%	54.4%
HOCKEYKVÄLL MED FYRAN	Sweden	Sport	19:08	41	24.1%	50.3%
BINGOLOTTO	Sweden	Game Show	21:27	37	24.0%	58.0%
ÄNTLIGEN HEMMA		Magazine	20:34	22	23.0%	54.3%
HANDBOLLS VM	Sweden	Sport	21:40	42	22.9%	54.6%
TRE KRONOR	Sweden	Ser.–Daily soap	20:06	44	22.7%	46.9%
SIKTA MOT STJÄRNORNA	Sweden	Variety Show	21:21	30	20.7%	39.8%
BARN 2000		Documentary	21:27	27	18.8%	37.9%

Note: Highest rated episode for a program which aired four times or more

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
AGNETAS NYÅRSKARAMELLER	Sweden	Variety Show	01/01	20:02	50	26.9%	51.4%
FRÖKEN SEVERIGE	Sweden	Variety Show	27/03	22:16	25	24.1%	61.1%
CROCODILE DUNDEE II	Australia	Movie	20/11	21:04	49	23.9%	53.0%
BECK-MANNEN MED IKONERNA	Sweden	Series–Crime	19/12	22:18	40	22.1%	59.6%
FILMGALAN	Sweden	Variety Show	08/02	4:01	47	21.7%	51.6%
MISS SWEDEN	Sweden	Series–Crime	12/12	21:04	48	21.5%	43.5%
CAROLAS JULKONSERT	Sweden	Music	10/12	21:04	48	21.4%	42.2%
CROCODILE DUNDEE	Australia	Movie	30/10	22:17	73	21.1%	59.1%
FOUR WEDDINGS AND A FUNURAL	UK	Movie	23/10	21:03	51	20.7%	45.8%
HEMVÄRN OCH PÅSSJUKA	Sweden	Variety Show	06/01	20:02	108	19.5%	39.6%

Source: MMS, Sweden

KANAL 5						
Top 10 Recurrent Programmes	Land	Genre	Start.Time	Length (m.)	Audience	Share
FRIENDS	USA	Sitcom	21:00	27	5.4%	11.7%
OP:7	Sweden	Series–Crime	20:30	57	5.3%	11.1%
VILLA MEDUZA	Sweden	Reality Show	20:00	54	4.5%	10.2%
JESSE	USA	Sitcom	21:30	26	4.2%	9.6%
RAZZIA	n.a.	Documentary	20:01	55	3.9%	9.5%
VÄNNER & FIENDER	Sweden	Ser.–Daily Soap	19:30	27	3.7%	8.7%
PROFILER	USA	Ser.–General	20:00	55	3.7%	8.4%
MÅNDAGSKLUBBEN	Sweden	Debates	22:00	56	3.6%	13.8%
I NÖD OCH LUST	Sweden	Variety Show	21:32	29	3.4%	8.0%
KAMELOTEN	USA	Series	20:00	55	3.4%	8.6%

Note: Highest rated episode for a program which aired four times or more

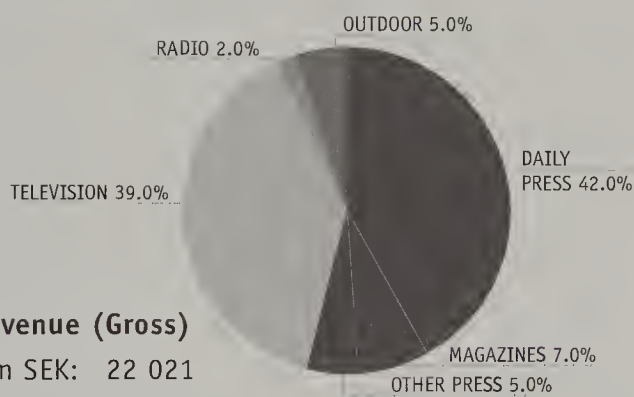
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE ROCK	USA	Movie	05/04	21.00	161	6.6%	19.9%
MISSION IMPOSSIBLE	USA	Movie	25/10	21.00	120	6.3%	16.9%
BODYGARD	USA	Movie	29/11	21.00	146	5.9%	18.5%
LETHAL WEAPON III	USA	Movie	22/11	21.00	136	5.8%	17.4%
STRIPTease	USA	Movie	13/12	21.00	134	5.5%	16.4%
MISS WORLD		Variety Show	12/04	21.00	127	5.5%	14.4%
ERASER	USA	Movie	11/08	21.00	135	5.3%	13.9%
OUTBREAK	USA	Movie	11/01	21.00	144	5.0%	15.5%
LETHAL WEAPON	USA	Movie	26/11	21.00	123	5.0%	20.1%
TIN CUP	USA	Movie	30/08	21:00	150	4.9%	16.9%

Source: MMS, Sweden

Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million SEK)	22 021
Total adspend (in million USD)	2 585
Total adspend (in million EUR)	2 573
TV adspend (in million SEK)	8 481
TV adspend (in million USD)	995
TV adspend (in million EUR)	991
TV adspend in % of GDP	0.43
TV adspend per capita (USD)	112

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



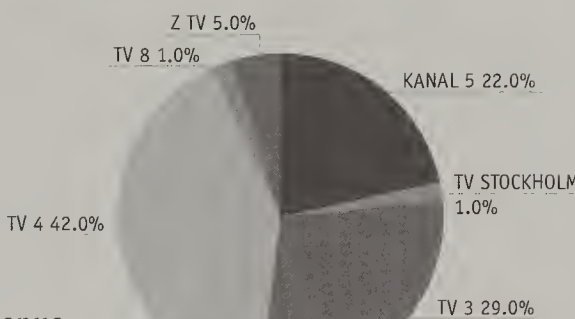
Total Revenue (Gross)
in million SEK: 22 021
in million EUR: 2 573

Source: Sifo Research & Consulting

TV ADVERTISING STATISTICS	
Total number of spots broadcast	475 360
Average spot length (in sec.)	26.3
Total number of advertisers	15 775
Number of TV advertisers	670
Total number of advertised products	23 300
Number products advertised on TV	1 490

Source: Sifo Research & Consulting

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue
in million SEK: 8 481
in million EUR: 991

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
FOOD	2 785	2094	75.2%	24.7%
COSMETICS	1 147	883	77.0%	10.4%
RETAIL	4 576	796	17.4%	9.4%
FINANCE	1 651	676	40.9%	8.0%
RADIO, TV, MUSIC	792	660	83.3%	7.8%
CARS	1 840	505	27.4%	6.0%
COMPUTERS	1 882	494	26.2%	5.8%
BOOKS, MEDIA	1.267	463	36.5%	5.5%
TRAVELS	1 406	362	25.7%	4.3%
INFORMATION, ORGANISATIONS	1 436	323	22.5%	3.8%
OTHERS	3 239	1 225	37.8%	14.4%
TV Advertisers				
PROCTER & GAMBLE	273	253	92.7%	3.0%
ICA	556	171	30.8%	2.0%
TELIA	614	160	26.1%	1.9%
COCA-COLA	175	158	90.3%	1.9%
SV. SPEL	211	138	65.4%	1.6%
COSMETIQUE FRANCE	150	133	88.7%	1.6%
KRAFT FREIA MARABOU	189	131	69.3%	1.5%
COLGATE-PALMOLIVE	141	130	92.2%	1.5%
PRIPPS BRYGGERIER	164	125	76.2%	1.5%
MC DONALDS	190	124	65.3%	1.5%
OTHERS	19 358	6 958	35.9%	82.0%
Total (in million SEK)	22 021	8 481	38.5%	100.0%
Total (in million EUR)	2 573	991	38.5%	100.0%

Source: Sifo Research & Consulting

Switzerland

The TV market is still fluid. Advertising investments in television rose again in 1999 but the proportion of TV in the classic media mix is still far behind the European average. A great challenge waiting to be taken up: but how?

The public broadcasting companies were able to hold their market shares. They benefit from an exceptionally loyal following. The competition for the favour of the public is largely concentrated on the private companies. Here there are clear utilisation differences between the language regions. Whereas in German-speaking Switzerland the private broadcasters can hardly come up to the success of SF1, in French-speaking and Italian-speaking Switzerland competition from private operators like TF1, M6, Canale 5 and Italia 1 is felt much more strongly. There the public law companies are used mainly as information channels. The new Swiss programmes (RTL/ProSieben Schweiz and TV3) announced last time were not able to achieve a breakthrough. They did manage to set accents on the market with respect to professionalism but they were not able to shake up the viewer market. The ratings remained well below expectations, or the deeply rooted viewing habits had simply been underestimated. The great temptation – as in neighbouring countries – is to force the necessary attention. Shows like “Big Brother” and “Expedition Robinson” have been announced. TV3 launched a Swiss version of “Robinson” successfully but a once-a-week highlight cannot save an entire channel. In the meantime TV3 has had to take off three different productions of its own. For new operators, small Switzerland with its strong public channels is a hard nut to crack, and an expensive one. That is what the investors are afraid of.

The various Swiss advertising splits continue to benefit from TV spending. The programme fields are very popular and show an appropriate, reliably planable, advertising capacity. Continuity of programme content pays off. The Kabel I, RTL II, RTL and SF1 channels prove this in Switzerland.

The Telecontrol people meter panel was raised by almost 20% at the beginning of 2000. This significantly enhances data reliability.

The legal restrictions on TV publicity have not changed and will probably not do so before end 2002. Consequently the TV market cannot take advantage of any slackening or raising of restrictions to expand.

No significant innovations in TV business are to be expected on the Swiss market under the present market conditions. The range offered remains varied and attractive but it is no platform for an imminent challenge. Business as usual.

Switzerland

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General Data

COUNTRY	
Land area (km²)	41 285
Total population	7 123 500
Number of households	3 161 300
Average household size	2.3
In % of households equipped	
Phone	97.0
Mobile telephone subscribers	22.0¹
PC's	49.0
Internet access	26.3
Internet users	31.5

Source: IHA, Hergiswil

¹in 1998; EITO 2000

ECONOMICS	
GDP in million CHF (at current prices)	380 011
GDP per capita in CHF (at current prices)	53 282
Inflation rate in 1999 (in %)	0.8
Value of GBP in Euro (EUR)*	1 EUR = 1.605 CHF
Value of GBP in US-Dollar (USD)*	1 USD = 1.598 CHF

Sources: Bundesamt für Statistik, IHA Hergiswil

*December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	2 861 400
In % of all households	92.0
Numbers of channels received by 70% of the population	31
TV License-Fee cost per year	CHF 270.–/EUR 168.20

TV EQUIPMENT	
	in % of TVHH
Colour TV	98.0
Multiset (homes with more than 1 TV set)	31.0
VCR	68.0
Teletext	63.0
Remote control	92.0

Sources: SRG Jahresbericht 99, Billag

¹SES/Astra

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	84.1¹
Satellite	private dish/DTH	9.0
	collective dish/SMATV	5.0
Terrestrial	analog	n.a.
	digital	0.0
	MMDS	0.0

TV SUBSCRIPTION			
Analog pay TV subscribers	3.0%	Digital TV subscribers	none

Sources: Homepage Teleclub/SRG Jahresbericht 99

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Salses H.
SF1 DRS	1953	T, C	98%	German	135	Generalist	L–F, Adv.	Publisuisse
SF2 DRS	1997	T, C	93%	German	140	Generalist	L–F, Adv.	Publisuisse
TSR 1	1954	T, C	86%	French	167	Generalist	L–F, Adv.	Publisuisse
TSR 2	1997	T, C	52%	French	163	Generalist	L–F, Adv.	Publisuisse
TSI 1	1954	T, C	85%	Italian	128	Generalist	L–F, Adv.	Publisuisse
TSI 2	1997	T, C	46%	Italian	128	Generalist	L–F, Adv.	Publisuisse

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Salses H.
TELE 24	1998	C	65%	German	168	News, Talk	Adv.	Belcom AG
STAR TV	1995	C	29%	German	n.a.	Movies	Adv.	Star TV
SWIZZ	1999	C	50%	German	n.a.	Music	Adv.	Radiotele AG
TV3	1999	C	74%	German	168	Generalist	Adv.	TA-Media

Source: SRG Jahresbericht 99

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ARTE	Public	C, S	59%	German/French	Cultural	L-F, Adv.
EUROSPORT	Private	C, S	75%	German/French	Sport	Adv.
MTV EUROPE	Private	C, S	29%	English	Music	Adv.
CNN Int.	Private	C, S	64%	English	News	Adv.
EURONEWS	Private	C, S	49%	German/French	News	Adv.
TV 5 EUROPE	Public	C, S	n.a.	French	Generalist	L-F, Adv.
NBC	Private	n.a.	45%	English	Generalist	Adv.
3 SAT	Public	C, S	79%	German	Generalist	L-F

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
SAT 1	Private	C, S	90%	German	Generalist	Adv.
RTL	Private	C, S	91%	German	Generalist	Adv.
PRO SIEBEN	Private	C, S	89%	German	Generalist	Adv.
RTL 2	Private	C, S	83%	German	Generalist	Adv.
KABEL 1	Private	C, S	52%	German	Generalist	Adv.
ARD	Public	T, C, S	94%	German	Generalist	L-F, Adv.
ZDF	Public	T, C, S	94%	German	Generalist	L-F, Adv.
SWR	Public	C, S	83%	German	Generalist	L-F
BAYERN 3	Public	C, S	84%	German	Generalist	L-F
ORF 1	Public	C, S	89%	German	Generalist	L-F, Adv.
ORF 2	Public	C, S	86%	German	Generalist	L-F, Adv.
SUPER RTL	Private	C, S	71%	German	Entertainment	Adv.
TF1	Private	C, S	61%	French	Generalist	Adv.
FRANCE 2	Public	C, S	61%	French	Generalist	L-F, Adv.
FRANCE 3	Public	C, S	61%	French	Generalist	L-F, Adv.
M 6	Private	C, S	61%	French	Generalist	Adv., Sub.
RTL 9	Private	C, S	n.a.	French	Series / Movies	Adv., Sub.
RAI 1	Public	T, C, S	65%	Italian	Generalist	L-F, Adv.
RAI 2	Public	T, C, S	65%	Italian	Generalist	L-F, Adv.
RAI 3	Public	T, C, S	65%	Italian	Generalist	L-F, Adv.
CANALE 5	Private	T, C, S	n.a.	Italian	Generalist	Adv.
ITALIA 1	Private	T, C, S	n.a.	Italian	Generalist	Adv.
TMC	Private	T, C, S	n.a.	Italian	Generalist	Adv.
VIVA	Private	C, S	55%	German	Music	Adv.
VIVA 2	Private	C, S	14%	German	Music	Adv.
N-TV	Private	C, S	49%	German	News	Adv.
VOX	Private	C, S	70%	German	Generalist	Adv.
DSF	Private	C, S	67%	German	Sport	Adv.
KINDERKANAL	Public	C, S	43%	German	Children TV	L-F
TVE 1	Public	n.a.	36%	Spanish	Generalist	Gvt.

Source: SRG Jahresbericht 99

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscribers	Language	h/week	Program.	Cost/m.	Revenue	Sales H.
Teleclub	1982	C	85 000	German	n.a.	Movie	35	Adv., Sub	Teleclub AG

Source: Homepage Teleclub

Viewing Patterns

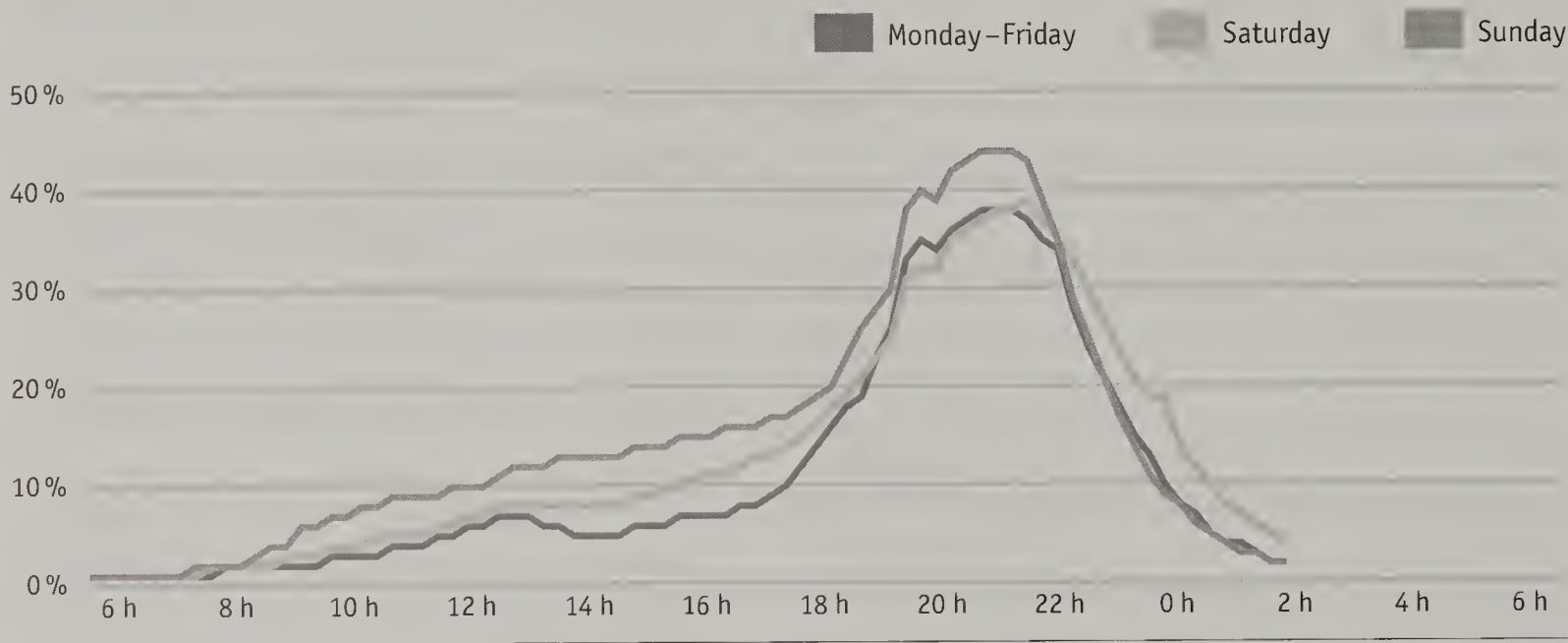
AUDIENCE MEASUREMENT

Name of the Service and Institute:	IHA, Hergiswil		
Panel/Sampling Size	3 925 individuals/1 750 households		
Instrument used (people-meter, telefon, face-to-face)	People-meter		
Population size in 000	CH-G	CH-F	CH-I
Individuals 3+	5 025	1 624	308
Adults 15–74	3 929	1 268	244
Main Purchase Responsibles 20–49	1 171	407	64
Young Adults 15–49	2 575	853	149

Source: IHA Telecontrol

TOTAL TV RATING 1999

Adults Age: 15+



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)

CH-G	Adults 15–74			Young Adults 15–49			Housewives 20–49		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	69	70	71	66	67	67	70	70	70
Viewing time per Viewer	184	186	190	168	171	177	184	186	194
Viewing time per Individual	128	131	136	111	115	120	129	131	136

Source: IHA Telecontrol/Deutsche Schweiz

DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)

CH-F	Adults 15–74			Young Adults 15–49			Housewives 20–49		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	68	70	70	64	66	67	70	71	72
Viewing time per Viewer	211	216	221	191	199	203	210	217	220
Viewing time per Individual	144	151	155	123	132	136	146	155	159

Source: IHA Telecontrol/Französische Schweiz

DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)

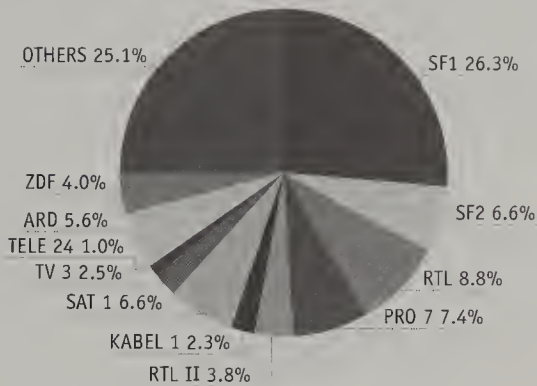
CH-I	Adults 15–74			Young Adults 15–49			Housewives 20–49		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	70	71	72	65	65	65	74	71	73
Viewing time per Viewer	220	229	233	198	206	213	225	229	238
Viewing time per Individual	155	164	168	129	134	140	166	163	174

Source: IHA Telecontrol/Italienische Schweiz

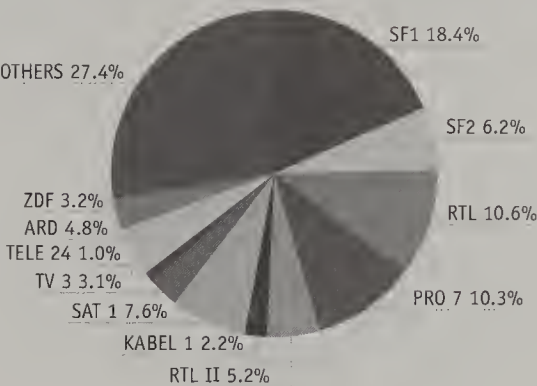
Audience Shares – German speaking Switzerland

AUDIENCE SHARES OF MAIN CHANNELS

Adults 15–74, all day (02:00–02:00)



Young Adults 15–49, all day (02:00–02:00)



Source: IHA Telecontrol/Deutsche Schweiz

AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00

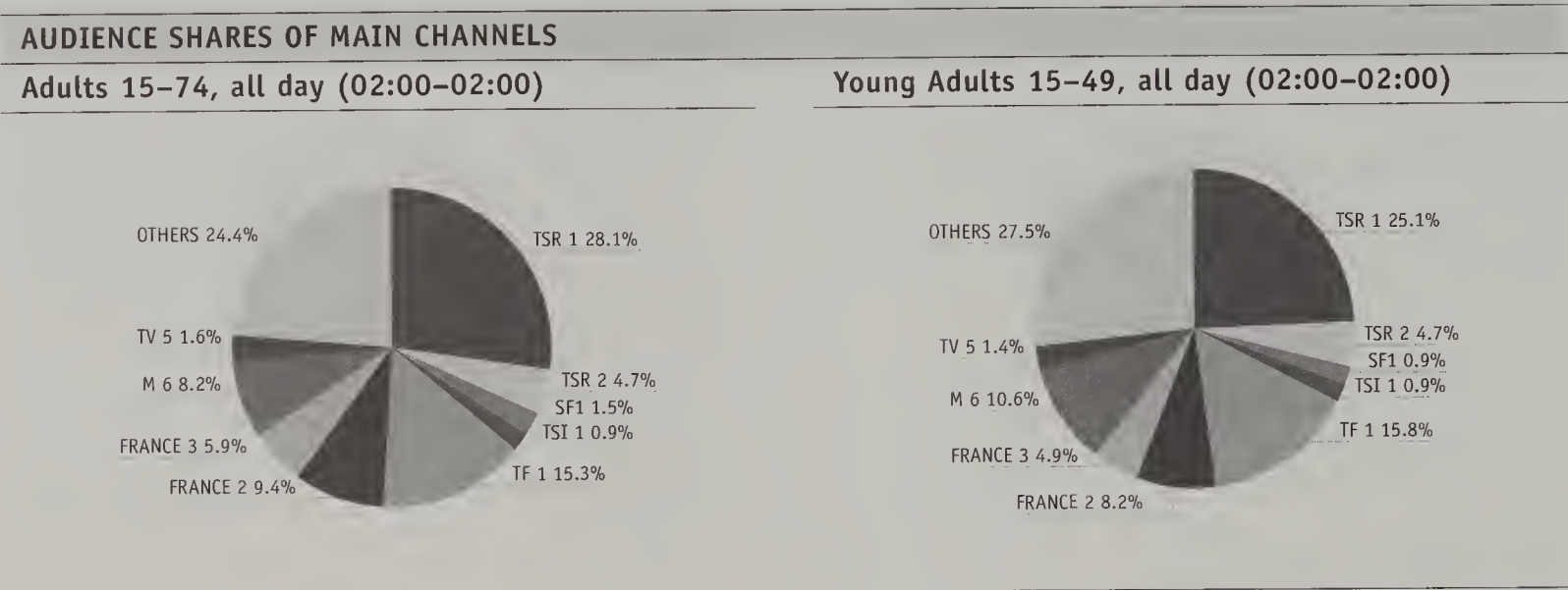
	Adults 15–74		Young Adults 15–49		Housewives 20–49	
	1998	1999	1998	1999	1998	1999
SF 1	25.6%	26.3%	18.0%	18.4%	18.1%	18.9%
SF 2	7.8%	6.6%	7.4%	6.2%	6.0%	5.3%
RTL	8.8%	8.8%	10.5%	10.6%	12.0%	11.9%
PRO SIEBEN	7.5%	7.4%	10.6%	10.3%	10.6%	9.7%
RTL II	3.6%	3.8%	4.8%	5.2%	4.7%	4.6%
KABEL 1	1.7%	2.3%	1.8%	2.2%	1.7%	2.2%
SAT 1	7.2%	6.6%	7.7%	7.6%	8.3%	8.2%
TV 3	n.a.	2.5%	n.a.	3.1%	n.a.	3.1%
TELE 24	0.6%	1.0%	0.7%	1.0%	0.7%	1.1%
ARD	5.8%	5.6%	5.1%	4.8%	5.6%	5.2%
ZDF	4.3%	4.0%	3.6%	3.2%	3.8%	3.5%
OTHERS	27.1%	25.1%	29.8%	27.4%	28.5%	26.3%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS

	Adults 15–74		Young Adults 15–49		Housewives 20–49	
	Day Time 17–19:30 h	Prime Time 18–23h	Day Time 17–19:30 h	Prime Time 18–23h	Day Time 17–19:30 h	Prime Time 18–23h
SF 1	25.5%	34.7%	16.1%	25.1%	17.0%	25.6%
SF 2	5.1%	7.0%	5.4%	6.8%	4.4%	5.9%
RTL	8.3%	7.3%	10.8%	9.7%	12.3%	10.7%
PRO SIEBEN	6.7%	5.8%	10.3%	8.7%	8.2%	7.8%
RTL II	3.4%	3.5%	5.3%	5.1%	4.4%	4.6%
KABEL 1	2.0%	2.0%	1.5%	1.8%	1.5%	1.8%
SAT 1	5.9%	5.3%	6.3%	6.5%	6.1%	6.6%
TV 3	2.5%	3.0%	3.0%	3.9%	3.5%	4.0%
TELE 24	1.2%	1.1%	1.1%	1.1%	1.3%	1.2%
ARD	11.3%	5.9%	10.9%	5.5%	13.0%	6.0%
ZDF	4.1%	4.2%	2.7%	3.4%	3.3%	3.8%
OTHERS	24.0%	20.2%	26.6%	22.4%	25.0%	22.0%

Source: IHA Telecontrol German speaking part of Switzerland

Audience Shares – French speaking Switzerland



Source: IHA Telecontrol/Französische Schweiz

AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00						
	Adults 15–74		Young Adults 15–49		Housewives 20–49	
	1998	1999	1998	1999	1998	1999
TSR 1	29.3%	28.1%	26.4%	25.1%	27.4%	26.6%
TSR 2	5.0%	4.7%	4.4%	4.7%	3.9%	4.3%
SF1	1.4%	1.5%	0.6%	0.9%	0.7%	1.0%
TSI 1	0.9%	0.9%	1.0%	0.9%	1.0%	1.0%
TF 1	15.7%	15.3%	16.6%	15.8%	17.2%	16.5%
FRANCE 2	9.6%	9.4%	8.3%	8.2%	8.5%	8.7%
FRANCE 3	6.1%	5.9%	5.1%	4.9%	5.0%	5.1%
M 6	8.5%	8.2%	11.2%	10.6%	11.4%	10.6%
TV 5	1.3%	1.6%	2.1%	1.4%	1.2%	1.5%
OTHERS	22.2%	24.4%	25.3%	27.5%	23.7%	24.7%

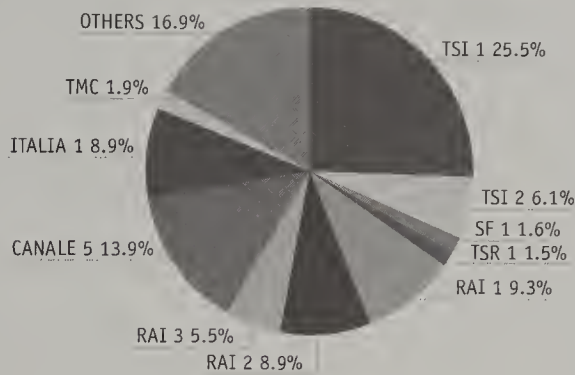
AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS						
	Adults 15–74		Young Adults 15–49		Housewives 20–49	
	Day Time 17–19:30 h	Prime Time 18–23h	Day Time 17–19:30 h	Prime Time 18–23h	Day Time 17–19:30 h	Prime Time 18–23h
TSR 1	32.2%	33.3%	25.2%	29.7%	27.0%	31.5%
TSR 2	4.8%	4.7%	5.8%	4.4%	5.4%	4.0%
SF1	1.4%	2.2%	0.6%	1.1%	0.6%	1.4%
TSI 1	1.0%	0.9%	0.8%	0.9%	0.9%	0.9%
TF 1	13.4%	14.5%	16.6%	15.4%	18.4%	15.8%
FRANCE 2	6.8%	7.6%	7.4%	7.7%	6.8%	7.8%
FRANCE 3	7.0%	6.7%	4.7%	5.2%	5.0%	5.4%
M 6	7.1%	8.0%	9.6%	10.6%	8.8%	10.2%
TV 5	1.9%	1.2%	1.6%	1.0%	1.8%	1.1%
OTHERS	24.4%	20.9%	27.7%	24.0%	25.3%	21.9%

Source: IHA Telecontrol French part of Switzerland

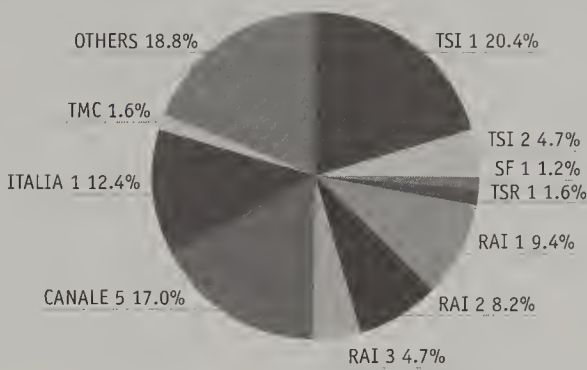
Audience Shares – Italian speaking Switzerland

AUDIENCE SHARES OF MAIN CHANNELS

Adults 15–74, all day (02:00–02:00)



Young Adults 15–49, all day (02:00–02:00)



Source: IHA Telecontrol/Italienische Schweiz

AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00

	Adults 15–74		Young Adults 15–49		Housewives 20–49	
	1998	1999	1998	1999	1998	1999
TSI 1	24.6%	25.5%	19.7%	20.2%	19.2%	20.4%
TSI 2	5.7%	6.1%	5.4%	5.4%	4.1%	4.7%
SF 1	1.3%	1.6%	0.8%	0.9%	0.9%	1.2%
TSR 1	1.7%	1.5%	1.3%	1.5%	1.2%	1.6%
RAI 1	10.3%	9.3%	10.5%	8.8%	11.1%	9.4%
RAI 2	9.5%	8.9%	8.7%	7.9%	9.3%	8.2%
RAI 3	6.1%	5.5%	5.7%	5.0%	5.5%	4.7%
CANALE 5	13.3%	13.9%	14.4%	16.1%	15.2%	17.0%
ITALIA 1	8.9%	8.9%	13.0%	13.3%	12.9%	12.4%
TMC	2.2%	1.9%	2.2%	1.9%	2.0%	1.6%
OTHERS	16.4%	16.9%	18.3%	19.0%	18.6%	18.8%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS

	Adults 15–74		Young Adults 15–49		Housewives 20–49	
	Day Time 17–19:30 h	Prime Time 18–23h	Day Time 17–19:30 h	Prime Time 18–23h	Day Time 17–19:30 h	Prime Time 18–23h
TSI 1	32.3%	32.6%	24.6%	25.3%	25.3%	25.5%
TSI 2	4.9%	6.0%	4.7%	5.7%	4.1%	5.1%
SF 1	1.4%	1.8%	0.8%	0.8%	1.2%	1.1%
TSR 1	1.2%	1.2%	1.4%	1.2%	1.4%	1.3%
RAI 1	7.2%	9.1%	7.3%	8.8%	7.5%	9.4%
RAI 2	8.3%	8.1%	6.6%	7.5%	6.7%	7.7%
RAI 3	5.3%	5.5%	4.9%	5.3%	4.5%	5.0%
CANALE 5	14.0%	12.7%	16.6%	15.7%	18.7%	16.2%
ITALIA 1	8.0%	8.5%	12.8%	13.0%	10.7%	12.3%
TMC	1.3%	1.4%	1.6%	1.5%	1.3%	1.3%
OTHERS	16.1%	13.1%	18.7%	15.2%	18.6%	15.1%

Source: IHA Telecontrol Italian speaking part of Switzerland

Top Programmes Channel by Channel

SF 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TAGESSCHAU	Germany	News	n.a.	19:30	20	31.3%	75.5%
FASCHT E FAMILIE	Switzerland	Series	n.a.	20:00	25	26.0%	64.0%
BENISSIMO	Switzerland	Game Show	n.a.	20:06	94	24.3%	61.9%
QUER	Switzerland	Magazine	n.a.	20:30	76	21.1%	49.1%
KASSENSTURZ	Switzerland	Magazine	n.a.	21:06	29	21.0%	53.5%
WANNA BET	Germany	Game Show	n.a.	20:16	157	21.0%	53.1%
10 VOR 10	Switzerland	News	n.a.	21:54	30	20.9%	58.6%
TOP OF SWITZERLAND	Switzerland	Show	n.a.	20:15	105	19.5%	49.0%
SCHWEIZ AKTUELL	Switzerland	Magazin	n.a.	19:00	24	19.3%	55.3%
DOK	Switzerland	Documentary	n.a.	20:05	48	18.8%	49.1%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ELECTION 99	Switzerland	News	24/10	18:53	30	17.4%	52.3%
ATHLETIC/INTERNAT. MEETING		Sport	11/08	19:55	160	17.1%	50.1%
PEOPLE 99	n.a.	Show	21/01	20:03	59	16.8%	42.1%
MISS SWITZERLAND	Switzerland	Variety Show	28/08	20:10	101	14.7%	38.3%
ELECTION 99	Switzerland	News	25/10	21:03	53	13.9%	36.8%
GOLDENEYE	USA	Movie	02/01	20:02	121	13.6%	31.5%
GRAND PRIX DER VOLKSMUSIK	n.a.	Music	04/09	20:15	134	12.3%	38.5%
ELECTION 99	Switzerland	News	11/03	7:45	283	11.9%	84.2%
PRIX WALO – AWARD	Switzerland	Variety Show	06/03	20:05	124	11.5%	32.7%
HUMORFESTIVAL AROSA	Switzerland	Variety Show	09/01	20:01	94	11.4%	28.4%
SF 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
GESUNDHEITS SPRECHSTUNDE	Switzerland	Magazin	n.a.	20:08	55	12.4%	26.4%
QUER – SPEZIAL	Switzerland	Talk Show	n.a.	20:02	87	11.3%	37.6%
SPORT AKTUELL	Switzerland	Sport	n.a.	20:24	20	7.6%	26.0%
AKTENZEICHEN XY... UNGELÖST	Germany	Documentary	n.a.	20:30	58	7.6%	21.3%
MARKTPLATZ	Switzerland	Magazine	n.a.	20:01	66	6.9%	16.2%
HAPPY HOUR	Switzerland	Magazine	n.a.	20:04	20	6.5%	19.8%
CAFÉ BÂLE	Switzerland	Comedy Show	n.a.	21:03	25	5.4%	11.5%
NZZ FORMAT	Switzerland	Magazine	n.a.	21:36	31	5.1%	13.1%
MOSIMANNS VEGETARISCHE KÜCHE	Switzerland	Show	n.a.	21:34	11	4.6%	13.1%
WEEKEND MUSIC	Switzerland	Music	n.a.	21:05	134	4.4%	15.7%
Top 10 Single Programmes		Genre	Date	Start.Time	Length (m.)	Audience	Share
SKI W. CUP DOWNHILL M		Sport	16/01	12:27	93	18.8%	77.4%
SKI – W. CHMP		Sport	07/02	18:54	68	18.6%	44.1%
SKI – W. CHMP		Sport	06/02	18:55	86	16.8%	45.0%
SKI – W. CHMP		Sport	14/02	21:27	48	16.3%	36.1%
SKI – W. CHMP		Sport	02/03	20:26	67	16.0%	36.6%
SKI – W. CHMP		Sport	03/02	20:25	68	15.7%	38.8%
FBAL EU CHMP QUALIFICATION		Sport	09/06	20:07	105	14.9%	44.5%
SKI SLALOM W. CUP M		Sport	10/01	12:54	52	12.6%	57.6%
SKI SLALOM W. CUP M		Sport	17/01	13:11	63	12.2%	61.9%
SKI SLALOM W. CUP M		Sport	19/12	13:05	72	11.5%	57.8%

Source: IHA-Telecontrol/German part of Switzerland/Adults 15-74

TSR 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TJ – SOIR	Switzerland	News	n.a.	19:30	30	31.5%	71.2%
A BON ENTENDEUR	Switzerland	Magazine	n.a.	20:07	21	26.8%	60.2%
MISE AU POINT	Switzerland	Magazine	n.a.	20:00	51	23.3%	55.9%
JULIE LESCAUT	France	Series	n.a.	20:56	99	18.8%	41.2%
COMEDIE, COMEDIE	n.a.	Comedy	n.a.	20:33	94	17.9%	41.4%
C'EST LA VIE	n.a.	Series	n.a.	20:07	54	17.2%	48.4%
CHECK-UP	Switzerland	Magazine	n.a.	20:08	76	16.5%	45.3%
TEMPS PRESENT	Switzerland	Magazine	n.a.	20:10	87	16.5%	40.8%
LES MISTÈRES DU CORPS HUMAIN	Switzerland	Magazine	n.a.	20:11	49	16.2%	47.5%
AU DELA DES GRILLES	n.a.	Series	n.a.	0:00	36	15.7%	39.1%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
LE PLUS BEAU METIER DU MONDE	n.a.	Movie	01/03	20:18	99	21.3%	51.2%
ULTIME DECISION	n.a.	Movie	18/01	20:18	123	20.3%	46.7%
FBAL QUALIFICATIONS	n.a.	Sport	09/06	20:14	97	20.2%	52.1%
ESPRITS REBELLES	n.a.	Movie	08/02	20:27	94	20.2%	44.9%
MESURES D'URGENCES	n.a.	Movie	01/11	20:16	112	20.0%	44.8%
PEUR PRIMALE	n.a.	Movie	21/06	20:15	124	19.8%	46.4%
DIABOLIQUE	USA	Movie	08/03	20:12	102	19.8%	43.7%
LE PARI	n.a.	Movie	20/12	20:14	93	19.7%	44.8%
SABRINA	USA	Movie	11/01	20:12	121	19.4%	45.1%
AU REVOIR A JAMAIS	n.a.	Movie	06/12	20:21	115	18.6%	43.8%

Source: IHA-Telecontrol/French part of Switzerland/Adults 15-74

TSI 1						
Top 10 Recurrent Programmes	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TELEGIORNALE	News	n.a.	20:00	30	32.7%	65.4%
IL QUOTIDIANO	News	n.a.	19:27	26	25.3%	62.6%
SETTE DI SERA	Magazine	n.a.	19:22	35	22.8%	57.3%
IL REGIONALE	News	n.a.	19:00	30	22.3%	61.6%
POLITICA ALLA RIBALTA	Magazine	n.a.	19:00	55	21.8%	58.3%
FAX	Magazine	n.a.	20:41	74	18.4%	41.9%
UNA FAMIGLIA DA GENT VISCORA	Series	n.a.	20:43	32	17.8%	41.5%
ERA ORA	Magazine	n.a.	20:43	80	17.3%	37.1%
OL RISTORANT SAN SISTO	Series	n.a.	20:47	29	16.3%	40.1%
UN CASO PER DUE	Series	n.a.	20:38	58	15.9%	33.6%

Top 10 Single Programmes			Genre	Date	Start.Time	Length (m.)	Audience	Share
PROVINCIAL ELECTIONS TICINESI 99			News	18/04	20:46	89	27.0%	51.4%
PROVINCIAL ELECTIONS TICINESI 99			News	18/04	19:12	42	23.7%	62.0%
PROVINCIAL ELECTIONS TICINESI 99			News	19/04	19:27	26	20.7%	56.0%
CABARET DELLA SVIZZERA ITALIANA			Comedy Show	06/01	20:37	107	20.6%	42.4%
PROVINCIAL ELECTIONS TICINESI 99			News	24/10	20:44	78	20.1%	44.0%
PROVINCIAL ELECTIONS TICINESI 99			News	12/04	21:45	107	19.5%	41.1%
PROVINCIAL ELECTIONS TICINESI 99			News	24/10	18:59	40	19.3%	51.0%
PROVINCIAL ELECTIONS TICINESI 99			News	25/04	19:02	54	17.4%	50.6%
DECISIONE CRITICA			Movie	13/01	20:48	127	17.4%	40.0%
PROVINCIAL ELECTIONS TICINESI 99			News	18/04	17:11	62	17.1%	53.6%

Source: IHA-Telecontrol/Italian part of Switzerland/Adults 15-74

PRO SIEBEN							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
X-FILES	USA	Series-Mystery	n.a.	20:15	45	4.1%	10.3%
LIEBE SÜNDE	Gemany	Magazine	n.a.	22:20	39	3.6%	15.4%
WELT DER WUNDER	Gemany	Documentary	n.a.	19:45	21	3.5%	8.1%
CHICACO HOPE	USA	Series	n.a.	21:20	43	3.3%	9.4%
THE SENTINEL	USA	Series	n.a.	21:30	45	3.2%	9.2%
TV-TOTAL	Gemany	Entertainm.	n.a.	22:30	42	3.1%	14.9%
EMERGENCY ROOM	USA	Series	n.a.	20:15	44	3.1%	8.0%
DIE REPORTER	Gemany	Magazine	n.a.	22:20	51	2.9%	12.7%
OUTER LIMITS	USA	Series-Mystery	n.a.	21:20	42	2.8%	8.0%
FOCUS TV	Gemany	Magazine	n.a.	22:20	49	2.7%	13.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE CLIENT	USA	Movie	17/01	20:16	111	7.2%	17.6%
NOW AND THEN	USA	Movie	24/01	20:17	93	6.3%	14.0%
THE JURY	USA	Movie	03/10	20:18	140	6.2%	17.3%
THE SHAWSHANK REDEMPTION	USA	Movie	28/03	20:18	132	5.9%	14.1%
JAMES BOND	USA	Movie	24/10	20:20	123	5.8%	13.9%
FORREST GUMP	USA	Movie	30/01	20:19	129	5.7%	16.3%
PRIMAL FEAR	USA	Movie	05/04	20:19	123	5.7%	14.9%
NAKED GUN 2 1/2	USA	Movie	11/04	20:18	79	5.7%	12.8%
GEGEN DIE ZEIT	n.a.	Movie	07/02	20:16	78	5.4%	11.9%
SPACE JAM	USA	Movie	23/10	20:22	78	5.3%	14.4%

Source: IHA-Telecontrol/German part of Switzerland/Adults 15-74

RTL							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TRAUMHOCHZEIT	Germany	Game Show	n.a.	20:15	83	6.1%	20.0%
HAUSFIEBER	Germany	Game Show	n.a.	20:15	87	6.0%	14.0%
DR. STEFAN FRANK	Germany	Series-Medical	n.a.	20:15	45	5.8%	14.7%
GUTE ZEITEN SCHLECHTE ZEITEN	Germany	Series-Daily S.	n.a.	19:41	24	5.4%	14.0%
HINTER GITTERN – DER FRAUENKN.	Germany	Series-Gen.	n.a.	21:18	46	5.2%	14.2%
100 000 MARK SHOW	Germany	Game Show	n.a.	20:15	82	4.6%	13.6%
WHO WANTS TO BE A MILLIONAIRE	Germany	Game Show	n.a.	20:15	46	4.3%	12.2%
DOPPELTER EINSATZ	Germany	Series-Crime	n.a.	20:15	92	4.0%	10.1%
LIFE: DUMM GELAUFEN	Germany	Magazine	n.a.	19:09	48	3.9%	12.2%
ALARM FOR COBRA 11	Germany	Series-Action	n.a.	20:15	86	3.9%	11.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
DOMINO DAY	Germany	Variety Show	05/11	20:15	125	6.1%	20.0%
THE ROCK	USA	Movie	02/04	20:15	113	5.8%	16.3%
LATIN LOVER	n.a.	Movie	14/04	20:16	90	5.5%	15.1%
FLORIAN - LIEBE AUS G. HERZEN	Germany	Movie	24/03	20:16	94	5.4%	13.8%
ZÄRLICHE BEGIERDE	n.a.	Movie	17/02	20:16	91	5.4%	13.8%
HAPPY GILMORE	USA	Movie	28/02	20:15	88	5.3%	11.6%
FAIR GAME	USA	Movie	25/04	20:16	78	5.2%	12.7%
JEANNE D'ARC	USA	Movie	29/11	20:16	90	4.6%	11.9%
TWISTER	USA	Movie	05/04	20:15	101	4.6%	11.3%
BIRD ON A WIRE	USA	Movie	07/03	20:15	103	4.6%	11.0%

Source: IHA-Telecontrol/German part of Switzerland/Adults 15-74

RTL II							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
EXCLUSIV – DIE REPORTAGE	Germany	Magazine	n.a.	22:10	35	3.9%	14.4%
DIE DÜMMSTEN AUTOF. D. WELT	Germany	Magazine	n.a.	20:19	47	3.8%	9.9%
WALKER, TEXAS RANGER	USA	Series	n.a.	21:20	45	3.0%	7.6%
PEEP!	Germany	Magazine	n.a.	22:21	46	2.8%	12.8%
STARGATE	USA	Series	n.a.	20:18	40	2.5%	6.3%
X-FACTOR	USA	Series–Mystery	n.a.	21:20	44	2.4%	6.9%
DIE REDAKTION	Germany	Magazine	n.a.	22:57	29	2.2%	16.2%
IBIZA '99	Germany	Magazine	n.a.	22:04	33	2.1%	8.2%
STRIP	Germany	Magazine	n.a.	22:08	37	1.9%	7.1%
SONNE, SAND UND SINGLE CLUBS	Germany	Magazine	n.a.	22:08	48	1.8%	8.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE FUGITIVE	USA	Movie	05/03	20:17	123	2.8%	8.1%
THE PELICAN BRIEF	USA	Movie	29/01	20:16	131	2.7%	7.6%
THE POWER OF LOVE	USA	Movie	22/01	20:17	96	2.7%	7.3%
POLICE ACADEMY 7	USA	Movie	15/01	20:16	77	2.5%	7.0%
GILBERT GRAPE	USA	Movie	04/03	20:15	114	2.5%	7.0%
AUF KRIEGSFUSS MIT MAJOR PAYNE	n.a.	Movie	09/07	20:15	90	2.4%	8.7%
THE FUGITIVE	USA	Movie	15/10	20:16	123	2.4%	7.3%
IT'S MY PARTY	USA	Movie	02/12	20:17	101	2.4%	7.1%
STREET SHARKS	USA	Movie	19/02	22:16	86	2.3%	8.9%
KISS SHOT	n.a.	Movie	16/04	20:16	98	2.3%	6.0%

Source: IHA-Telecontrol/German part of Switzerland/Adults 15-74

KABEL 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
DIAGNOSIS MURDER	USA	Series–Crime	n.a.	21:16	43	1.8%	5.2%
GEH AUFS GANZE	Germany	Game Show	n.a.	18:47	29	1.6%	6.8%
WHEEL OF FORTUNE	Germany	Game Show	n.a.	19:30	32	1.4%	4.0%
K1 – DIE REPORTAGE	Germany	Magazine	n.a.	22:22	37	1.3%	6.8%
MATLOCK	USA	Series–Crime	n.a.	20:15	89	1.2%	3.5%
POINTMAN	USA	Series	n.a.	23:19	41	1.1%	9.6%
K1 – EXTRA	Germany	Magazine	n.a.	22:14	38	1.1%	4.5%
PERRY MASON	USA	Series–Crime	n.a.	18:10	91	1.1%	3.2%
K1 – DAS MAGAZIN	Germany	Magazine	n.a.	23:14	26	1.0%	8.6%
KUNG FU	USA	Series	n.a.	22:20	40	1.0%	5.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
C'ERA UNA VOLTA IL WEST	Italy	Movie	12/11	20:16	167	2.1%	7.1%
EINE LEICHE ZUM DESSERT	n.a.	Movie	16/03	20:15	91	1.9%	5.0%
DIRTY HARRY II	USA	Movie	21/03	22:18	116	1.7%	12.0%
IN 80 DAYS AROUND THE WORLD	USA	Movie	10/04	20:16	150	1.6%	4.7%
CLARAS SECRET	USA	Movie	26/10	20:15	99	1.5%	4.2%
BOHRINSEL IN FLAMMEN	USA	Movie	28/03	20:16	92	1.5%	3.3%
DIRTY HARRY III	USA	Movie	28/03	22:15	89	1.4%	6.5%
DOCTOR ZHIVAGO	USA	Movie	02/10	20:16	182	1.4%	4.5%
DAS GROSSE ERDBEBEN VON L.A.	USA	Movie	11/04	20:16	177	1.4%	4.3%
STEEL MAGNOLIAS	USA	Movie	19/10	20:15	110	1.4%	4.1%

Source: IHA-Telecontrol/German part of Switzerland/Adults 15-74

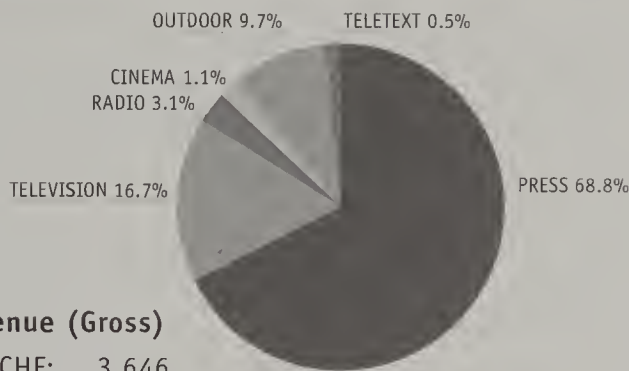
SAT 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ALL YOU NEED IS LOVE	Germany	Show	n.a.	20:13	84	7.5%	15.7%
DIE GLÜCKSSPIRALE	Germany	Game Show	n.a.	20:14	86	6.6%	15.2%
RACHE IST SÜSS	Germany	Show	n.a.	20:14	84	6.5%	14.3%
THE COUNT OF MONTE CRISTO	France	Series	n.a.	20:14	97	5.9%	12.8%
CANDID CAMERA	Germany	Comedy	n.a.	20:14	86	5.8%	12.3%
KOMMISSAR REX	Germany	Series-Crime	n.a.	20:14	46	5.2%	14.3%
FÜR ALLE FÄLLE STEFANIE	Germany	Series	n.a.	21:14	46	5.2%	13.7%
DIE WOCHENSCHAU	Germany	Comedy Show	n.a.	22:09	46	4.7%	17.5%
LIVE-RAN FUSSBALL	Germany	Sport	n.a.	16:15	92	3.8%	23.7%
VERZEIH MIR	Germany	Show	n.a.	20:14	45	3.7%	9.9%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
PRETTY WOMAN	USA	Movie	14/02	20:13	112	7.3%	16.3%
MRS WINTERBOURNE	USA	Movie	21/03	20:22	94	5.4%	12.6%
MARVIN`S ROOM	USA	Movie	12/12	20:22	94	5.2%	12.0%
AMERICAN WILDCATS	USA	Movie	31/01	20:14	100	4.9%	12.0%
WORKING GIRL	USA	Movie	16/05	20:23	102	4.4%	11.5%
VERFÜHRT	n.a.	Movie	02/03	20:14	96	4.0%	10.6%
CALLBOYS	Germany	Movie	11/05	20:12	93	3.8%	10.8%
LEATHAL WAPON II	USA	Movie	23/05	22:29	104	3.6%	20.1%
DAS SUPERWEIB	Germany	Movie	24/05	20:14	88	3.5%	10.0%
SLEEPLESS IN SEATLE	USA	Movie	05/04	20:14	97	3.5%	8.5%

Source: IHA-Telecontrol/German part of Switzerland/Adults 15-74

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend (in million CHF)		3 646
Total adspend (in million USD)		2 281
Total adspend (in million EUR)		2 271
TV adspend (in million CHF)		605
TV adspend (in million USD)		378
TV adspend (in million EUR)		377
TV adspend in % of GDP		0.18
TV adspend per capita (USD)		53.1

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



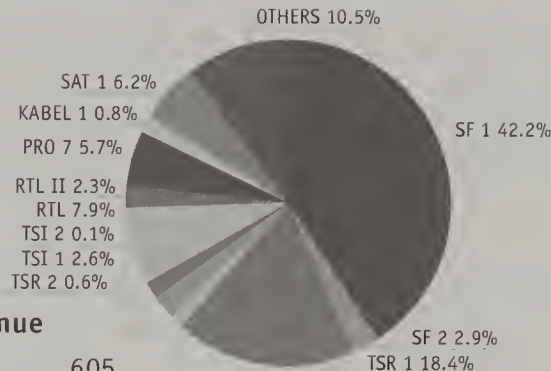
Total Revenue (Gross)
in million CHF: 3 646
in million EUR: 2 271

Source: Media Focus, Hergiswil

TV ADVERTISING STATISTICS	
Total number of spots broadcast	325 812
Average spot length (in sec.)	24
Total number of advertisers	17 108
Number of TV advertisers	882
Total number of advertised products	32 762
Number products advertised on TV	1 512

Source: Media Focus, Hergiswil

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue
in million CHF: 605
in million EUR: 377

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
AUTOMOBILE MARKET	352 591	49 096	13.9%	8.1%
TELECOMMUNICATION	233 716	40 705	17.4%	6.7%
CHOCOLATE – SWEETS	65 486	39 016	59.6%	6.5%
COMMERCE – TRADE	245 885	31 270	12.7%	5.2%
INSURANCES	96 385	25 293	26.2%	4.2%
NON ALCOHOLIC DRINKS	57 056	21 819	38.2%	3.6%
DAIRY PRODUCTS	56 993	20 592	36.1%	3.4%
HAIR CARE PRODUCTS	30 644	20 261	66.1%	3.4%
FINANCE – ECONOMY	183 754	18 164	9.9%	3.0%
OTC PHARMA PRODUCTS	52 405	15 832	30.2%	2.6%
OTHER	2 270 642	322 631	14.2%	53.4%
TV Advertisers				
PROCTER & GAMBLE SA. GENF	33 907	33 984	94.3%	5.6%
NESTLE SUISSE SA. VEVEY	38 975	25 252	64.8%	4.2%
LEVER FABERGE AG. ZUG	19 093	17 485	91.6%	2.9%
LORSA AG. GENF	24 410	16 933	69.4%	2.8%
EFFEMS AG. ZUG	25 383	16 466	64.9%	2.7%
COOP SCHWEIZ. BASEL	163 413	16 243	9.9%	2.7%
SWISSCOM. BERN	83 237	16 564	19.1%	2.7%
MIGROS. ZÜRICH	169 955	14 412	8.5%	2.4%
BEIERSDORF AG. MÜNCHENSTEIN	17 492	8 925	51.0%	1.5%
DIAX. ZÜRICH	54 029	7 996	14.8%	1.3%
OTHERS	3 015 683	430 419	14.2%	71.1%
Total (in 000 CHF)	3 645 577	604 680	16.6%	100.0%
Total (in 000 EUR)	2 271 388	376 748	16.6%	100.0%

Source: Media Focus, Hergiswil

United Kingdom

In 1999 ITV was still the UK's most popular channel, but it continues to lose viewers to both Channel 5 and cable and satellite channels. Overall, ITV's audience share averaged 31.2% in 1999, slowing its rate of decline from previous years. ITV's position was again reinforced by the highly rated 'Who Wants To Be A Millionaire' which averaged 13.4 million viewers across 1999 and peaked at 19.3 million for an edition in early March.

Following the targets set in 1998, ITV fell just short of its peak time audience share target of 39%, the final figure being 38.8%. As a central plank of its strategy to meet the peak time target, ITV undertook a significant change to its schedule. After much debate and following the approval of the Independent Television Commission, both of the main evening news shows on ITV were replaced.

The faster than expected growth in digital take-up also prompted the ITV management team to adjust the original peak time target for the year 2000 from 40% down to 38.5%. Some commentators are already doubting whether this revised target is achievable.

The future ownership of ITV again came to the fore in November with announcement of an agreed merger between Carlton Communications and United News & Media. This was closely followed by an announcement from Granada (the other major company involved in the running of ITV) that they were likely to make a bid for either Carlton or United if the ownership rules were changed to allow such a move to take place. The Competition Commission is currently considering this issue and will report in June 2000.

The resilience of ITV came mainly at the expense of the BBC. The overall audience share for its main flagship channel, BBC1 (focusing on entertainment, sport and news), dropped to 28.4%. The Top 100 separate programmes featured only 35 BBC shows as against 65 for ITV. There were some successes for BBC1, notably the series 'Walking With Dinosaurs' which received both critical acclaim and high audiences. BBC2 (factual and arts- lead) also showed a decline from 11.3% to 10.8%, partly explained by the transfer of some of its highly rated shows to BBC1. The BBC now has a new Director-General in Greg Dyke who replaced John Birt in early 2000 and who has already begun a restructuring of the organisation in order to direct more resources towards programme making.

Amongst the other terrestrial channels, Channel 4 remained constant at 10.3% whilst Channel 5 continued its growth of the previous year, rising to an overall share of 5.4% (up from 4.3% in 1998). Channel 5 enjoyed its highest rating programme since launch with 5.6m watching the Euro 2000 qualifier between England and Poland. Films continued to be the channel's mainstay with no fewer than 35 out of the Top 40 Channel 5 programmes coming from this genre, peaking at 5.4m for the showing of Independence Day in the same week as the football match detailed above. Together, these helped

Channel 5 to an overall audience share of 6.4% in that particular week.

Overall, penetration of multichannel services climbed from 26% in 1998 to 30% in 1999 with the majority of growth coming from an increase in cable (as opposed to dish) households. In addition to this, 1999 was the first full year of both satellite and terrestrial digital services in the UK.

Both Sky Digital and ONdigital used the lure of free set-top boxes to encourage the take-up of digital services, both through the conversion of existing analogue subscribers and through the sign up of new subscribers. By the end of the year, Sky claimed a total of 2.6 million digital satellite sales with ONdigital adding a further claimed 552,000 digital terrestrial households.

In all households, non-terrestrial channels now account for an average 14% share of viewing. In multichannel households, this figure rises to an average 37% and in the newer digital households, the figure is even higher at almost 50%.

In programming terms, Sky One continued to be the most popular non-terrestrial channel although its overall share declined from 4.3% in 1998 to 4.0% in 1999. Sky One's schedule continued to be dominated by US produced programming such as Friends and ER.

Reporting of viewing to digital channels commenced in November 1999 and over 90 separate channels are now monitored. As the direct frequency method of audience measurement cannot be used for digital households, two other techniques have been introduced to record viewing in these households.

June 1999 saw the announcement by BARB of the tender process for the new measurement contract to commence in January 2002. The contract was split into four sections – Research Design & Methodology, Establishment Surveys, Meter Panel Operation and Data Processing. Bids for the new contracts were required to be submitted by November.

United Kingdom

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General Data

COUNTRY		ECONOMICS	
Land area (km²)	241 752	GDP in million GBP (at current prices)	788 700
Total population	58 629 000	GDP per capita in GBP (at current prices)	13 452
Number of households	24 741 000	Inflation rate in 1999 (in %)	2.2
Average household size	2.3	Value of GBP in Euro (EUR)*	1 EUR = 0.6217 GBP
In % of households/population equipped		Value of GBP in US-Dollar (USD)*	1 USD = 0.6189 GBP
Phone	98.0/n.a.	Sources: BARB Establishment Survey, Oftel, ONS	
Mobile telephone subscribers	n.a./41.0	*December 1999	
PC's	34.0/n.a.		
Internet access	21.0/n.a.		
Internet users	n.a./30.0		

TV OVERVIEW	
Total number of TV households (TVHH)	23 988 000
In % of all households	97.0
Numbers of channels received by 70% of the population	5
TV License-Fee cost per year	GBP 101.–/EUR 161.60

TV EQUIPMENT		TV DISTRIBUTION	
		in % of TVHH	
Colour TV	99.0	Cable	passed 51.4
Multiset (homes with more than 1 TV set)	60.0		connected 25.1
VCR	84.0	Satellite	private dish/DTH 17.1
Teletext	74.0		collective dish/SMATV 0.7*
Remote control	93.0	Terrestrial	analog n.a.
Source: BARB Establishment Survey			digital 1.0
			MMDS n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	25.4%	Digital TV subscribers	9.6%
Source: ITC			

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Salses H.
BBC 1	1936	T, C, DS, DT	100%	English	168	Generalist	L–F	n.a.
BBC 2	1964	T, C, DS, DT	100%	English	n.a.	Generalist	L–F	n.a.
BBC CHOICE	1998	C, DS, DT	n.a.	English	n.a.	Generalist	L–F	n.a.
BBC NEWS24	1998	C, DS, DT	n.a.	English	168	News	L–F	n.a.

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Salses H.
ITV	1955	T, C, DT	100%	English	143.5	Generalist	Adv.	Carlton,*
GMTV	1993	T, C, DT	100%	English	24.5	Generalist	Adv.	In-house
CHANNEL 4	1982	T, C, S, DT, DS	100%	English	168	Generalist	Adv.	In-house
CHANNEL 5	1997	T, C, S, DT, DS	78%	English	168	Generalist	Adv.	In-house

Source: BARB

* TSMS, GRANADA

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
S4C	1982	T, C, DT, DS	5%	Eng/Welsh	130	Generalist	Adv.	TSMS
ITV 2	1998	C, DT	*	English	140	Generalist	Adv.	Carlton, **

*England and Wales, **TSMS, Granada

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech.Pen.	Language	Programming	Revenue
BLOOMBERG	Private	C, S, DS	3%	English	News	Adv.
CNBC	Private	C, S, DS	n.a.	English	Entertainment	Adv.
CNN	Private	C, S, DS	25%	English	News	Adv.
EURONEWS	Private	C, S, DS	5%	English	News	Adv.
EUROSPORT	Private	C, S, DS, DT	27%	English	Sport	Adv.
MTV	Private	C, S, DS, DT	25%	English	Music	Adv.
VH-1	Private	C, S, DS	26%	English	Music	Adv.
TV 5	Public	C,S	13%	French	Generalist	L-F, Spon.

OTHER FOREIGN CHANNELS					
Channels	Nature	Diffusion	Language	Programming	Revenue
ARD	Public	n.a.	German	Generalist	L-F, Adv.
ARTE/KINDERKANAL	Public	n.a.	German	Culture	L-F
BAYERN 3	Public	n.a.	German	Generalist	L-F
DSF	Private	n.a.	German	Sport	Adv.
N 3	Public	n.a.	German	Generalist	L-F
NETWORK 2	Public	n.a.	Irish	Generalist	L-F, Adv.
PRO 7	Private	n.a.	German	Generalist	Adv.
RAI 1	Public	n.a.	Italian	Generalist	L-F, Adv.
RAI 2	Public	n.a.	Italian	Generalist	L-F, Adv.
RTE 1	Public	n.a.	Irish	Generalist	L-F, Adv.
RTL	Private	n.a.	German	Generalist	Adv.
RTL 2	Private	n.a.	German	Generalist	Adv.
SAT 1	Private	n.a.	German	Generalist	Adv.
TV 3	Private	n.a.	Irish	Generalist	Adv.
TV 3	Private	n.a.	Swedish	Generalist	Adv.
VOX	Private	n.a.	German	Generalist	Adv.
ZDF	Public	n.a.	German	Generalist	L-F, Adv.

Source: ITC Factfile

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/m.	Revenue	Sales H.
.TV	1996	S, DS	n.a.	English	14	Computer	n.a.	Adv., Sub.	BSkyB
ANIMAL PLANET	1998	C, S, DS	n.a.	English	84	Docum.	n.a.	Adv., Sub.	Discovery
BRAVO	1990	C, S, DS	14 300	English	136	Entert.	n.a.	Adv., Sub.	Flextech
CARLTON CINEMA	1997	C, DT	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	Carlton
CARLTON FOOD N.	1997	C, DT	n.a.	English	56	Cookery	n.a.	Adv., Sub.	Carlton
CARTOON NETWORK	1996	C, S, DS, DT	17 000	English	n.a.	Children	n.a.	Adv., Sub.	Turner
CHALLENGE TV	1993	C, S, DS	15 200	English	84	Quiz	n.a.	Adv., Sub.	Flextech
DISCOVERY	1989	C, S	16 000	English	56	Docum.	n.a.	Adv., Sub.	Discovery
DI. CIVILISATIONS	1999	DS	n.a.	English	n.a.	Docum.	n.a.	Adv., Sub.	Discovery
DI. SCI-TREK	1999	DS	n.a.	English	n.a.	Docum.	n.a.	Adv., Sub.	Discovery
DI. TRAVEL & ADV.	1999	DS	n.a.	English	n.a.	Docum.	n.a.	Adv., Sub.	Discovery
DISNEY CHANNEL	1995	C, S, DS	9 000	English	112	Children	n.a.	Sub.	In-house
FILMFOUR	1998	C, DS, DT	n.a.	English	84	Movie	£5,99	Adv., Sub.	In-house
FOX KIDS	1996	C, S, DS	13 500	English	91	Children	n.a.	Adv., Sub.	BSkyB
GRANADA BREEZE	1996	C, S, DS, DT	11 500	English	84	Lifestyle	n.a.	Adv., Sub.	GSkyB
GR. MEN & MOTORS	1998	C, S, DS, DT	15 600	English	21	Entert.	n.a.	Adv., Sub.	GSkyB
GRANADA PLUS	1996	C, S, DS, DT	15 600	English	126	Entert.	n.a.	Adv., Sub.	GSkyB
HOME & LEISURE	1996	C, S, DS	16 000	English	n.a.	Lifestyle	n.a.	Adv., Sub.	Discovery
LIVING	1993	C, S, DS	16 900	English	126	Entert.	n.a.	Adv., Sub.	Flextech
M2	1999	DS	n.a.	English	n.a.	Music	n.a.	Adv., Sub.	MTV
MTV BASE	1999	DS	n.a.	English	n.a.	Music	n.a.	Adv., Sub.	MTV
MTV EXTRA	1999	DS	n.a.	English	n.a.	Music	n.a.	Adv., Sub.	MTV
MUTV	1998	C, S, DS, DT	n.a.	English	42	Sport	n.a.	Sub.	n.a.
NAT. GEOGRAPHIC	1997	C, S, DS	13 500	English	28	Docum.	n.a.	Adv., Sub.	BSkyB
NAT. GEO. ADV ONE	1999	C, S, DS	n.a.	English	n.a.	Docum.	n.a.	Adv., Sub.	BSkyB
NICK JR.	1999	DS	n.a.	English	n.a.	Children	n.a.	Adv., Sub.	BSkyB
NICKELODEON	1993	C, S, DS	15 800	English	84	Children	n.a.	Adv., Sub.	BSkyB
PARAMOUNT	1996	C, S, DS	15 800	English	n.a.	Comedy	n.a.	Adv., Sub.	BSkyB
QVC	1993	C, S, DS	n.a.	English	168	Home-Shopping	n.a.	Adv.	In-house
RAPTURE	1999	C, S, DS	n.a.	English	20	Children (Teen.)	n.a.	Adv. Sub.	In-house
SCI-FI	1996	C, S, DS	n.a.	English	126	Entert.	n.a.	Adv., Sub.	In-house
SKY CINEMA	1993	C, S, DS, DT	8 800	English	168	Movie	n.a.	Adv., Sub.	BSkyB
SKY CINEMA 2	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY MOVIEMAX	1993	C, S, DS, DT	8 900	English	168	Movie	n.a.	Adv., Sub.	BSkyB
SKY MOVIEMAX 2	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY MOVIEMAX 3	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY MOVIEMAX 4	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY MOVIEMAX 5	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY NEWS	1989	C, S, DS	n.a.	English	168	News	n.a.	Adv., Sub.	BSkyB
SKY ONE	1989	C, S, DS, DT	18 800	English	168	Entert.	n.a.	Adv., Sub.	BSkyB
SKY PREMIER	1993	C, S, DS, DT	9 000	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY PREMIER 2	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY PREMIER 3	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY PREMIER 4	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY PR. WIDESC.R.	1999	DS	n.a.	English	n.a.	Movie	n.a.	Adv., Sub.	BSkyB
SKY SPORTS.COM TV	1999	DS	n.a.	English	n.a.	Sport	n.a.	Adv., Sub.	BSkyB
SKY SPORTS 1	1991	C, S, DS, DT	10 800	English	168	Sport	n.a.	Adv., Sub.	BSkyB
SKY SPORTS 2	1994	C, S, DS, DT	10 500	English	109	Sport	n.a.	Adv., Sub.	BSkyB
SKY SPORTS 3	1996	C, S, DS, DT	11 000	English	93	Sport	n.a.	Adv., Sub.	BSkyB
SKY SPORTS EXTRA	1999	DS	n.a.	English	n.a.	Sport	n.a.	Adv., Sub.	BSkyB
SKY TRAVEL	1996	S,DS	n.a.	English	n.a.	Travel	n.a.	Adv., Sub.	BSkyB
THE BOX	1997	C,DS	n.a.	English	168	Music	n.a.	Adv., Sub.	In-house

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/m.	Revenue	Sales H.
THE HISTORY CH.	1996	C, S, DS	14 800	English	28	Docum.	n.a.	Adv., Sub.	BSkyB
TNT	1996	C, S, DS	18 100	English	n.a.	Old Movie	n.a.	Adv., Sub.	Turner
TRAVEL CHANNEL	1997	C, S, DS	n.a.	English	84	Travel	n.a.	Adv., Sub.	In-house
TROUBLE	1997	C, S, DS	14 300	English	n.a.	Children (Teen.)	n.a.	Adv., Sub.	Flextech
UK ARENA	1997	C, S, DS	n.a.	English	n.a.	Arts	n.a.	Adv., Sub.	Flextech
UK GOLD	1992	C, S, DS, DT	17 600	English	126	Entert.	n.a.	Adv., Sub.	Flextech
UK HORIZONS	1997	C, S, DS, DT	n.a.	English	n.a.	Docum.	n.a.	Adv., Sub.	Flextech
UK PLAY	1999	C, S, DS, DT	n.a.	English	n.a.	Music	n.a.	Adv., Sub.	Flextech
UK STYLE	1997	C, S, DS, DT	n.a.	English	n.a.	Lifestyle	n.a.	Adv., Sub.	Flextech
VH1 CLASSIC	1999	DS	n.a.	English	n.a.	Music	n.a.	Adv., Sub.	MTV
ZEE TV	1992	C, DS	n.a.	Asian	126	Generalist	n.a.	Adv.	In-house

DIGITAL PACKAGES									
Channels	Launch	Diff.	Decoder	Subscr.	Language	No. of ch.	Revenue	Cost/month	
ONDIGITAL	1998	DT	d-box packages are:	110 000*	English		Sub., Adv.		
				Primary channels		6		GBP 6.99	
				Primary channels		12		GBP 9.99	
				Sky prem. Channels in addition		5		GBP 11.00–24.00	
SKY DIGITAL	1998	DS	d-box packages are:	350 000**	English		Sub., Adv.		
				Value pack		5		GBP 7.00	
				Lifestyle Pack		14		GBP 10.00	
				Sky Knowledge		14		GBP 10.00	
				Sky Kids & Music		17		GBP 10.00	
				Sky Popular Mix		19		GBP 10.00	
				Sky Family		50		GBP 13.00	

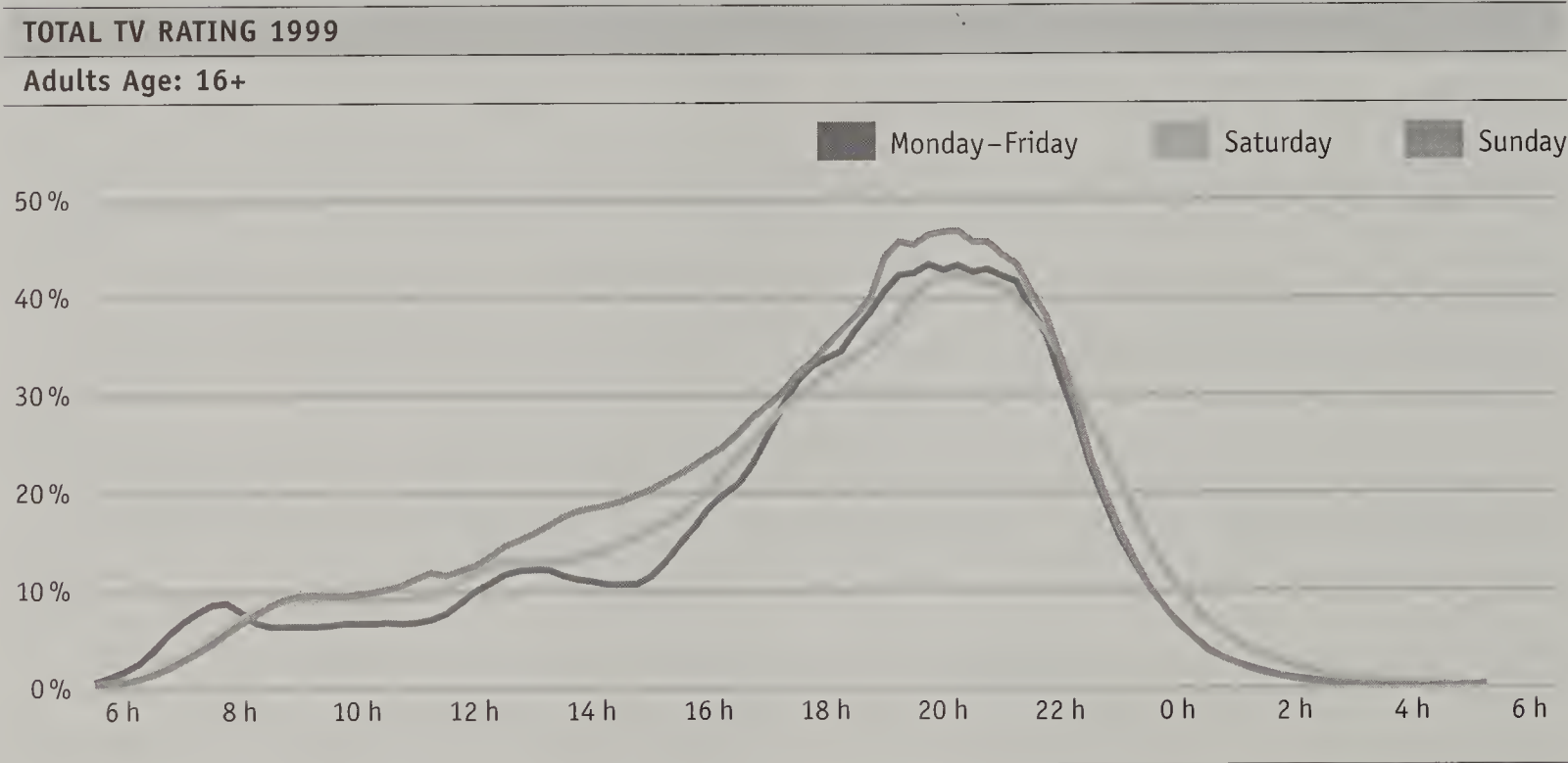
Source: ITC Factfile

*March 99, **January 99

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	BARB
Panel/Sampling Size	4 485 households
Instrument used (people-meter, telefon, face-to-face)	people-meter
Population size in 000	
Individuals 4+	58 629
Adults 16+	46 322
Housewives	24 741
Young Adults 16–34	15 669
Children 4–15	9 280

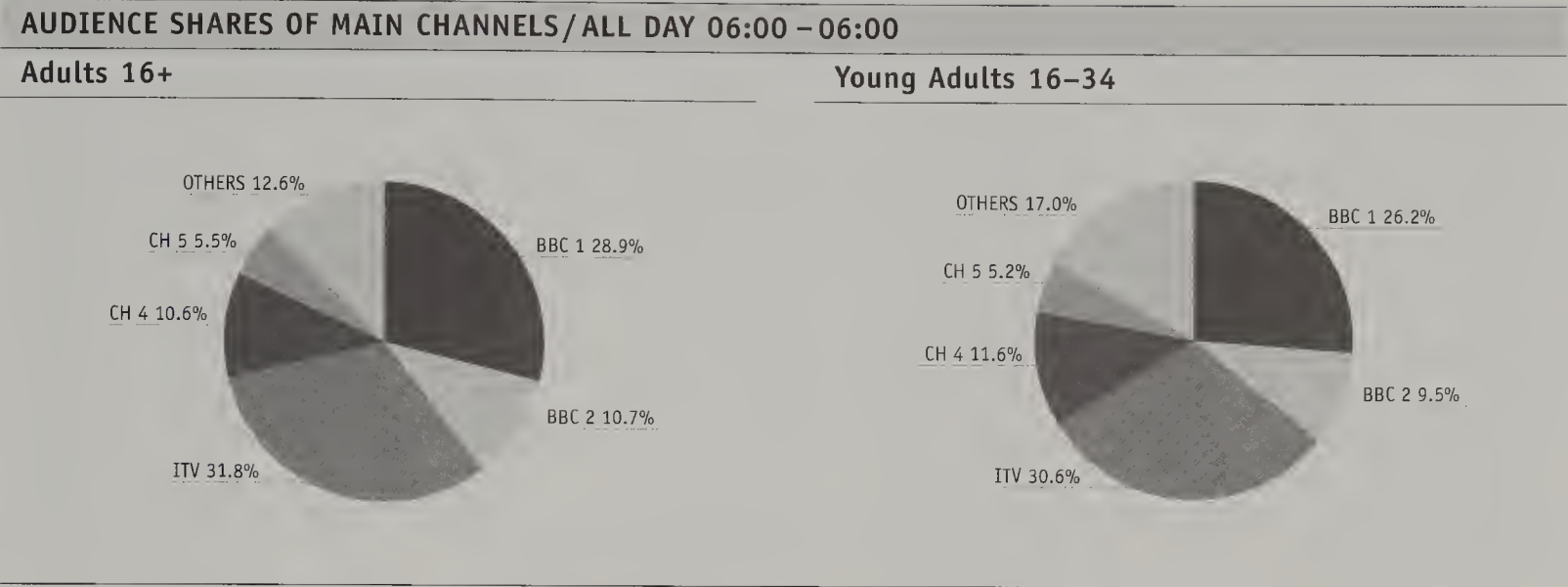
Source: BARB Establishment Survey June 1999



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 16+			Children 4–15			Young Adults 16–34			Housewives		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	81	81	79	n.a.	n.a.	71	74	73	72	86	85	83
Viewing time per Viewer	228	241	271	n.a.	n.a.	187	182	182	236	257	244	293
Viewing time per Individual	n.a.	230	232	152	151	157	n.a.	n.a.	193	n.a.	n.a.	264

Source: TNSofres/BARB

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 06:00 – 06:00								
	Adults 16+		Young Adults 16–34		Children 4–15		Housewives	
	1998	1999	1998	1999	1998	1999	1998	1999
BBC 1	30.0%	28.9%	27.3%	26.2%	25.5%	24.9%	30.2%	29.2%
BBC 2	11.1%	10.7%	9.9%	9.5%	12.8%	11.6%	10.9%	10.5%
ITV	32.2%	31.8%	31.2%	30.6%	27.4%	26.9%	33.8%	33.4%
CH 4	10.6%	10.6%	11.5%	11.6%	8.7%	8.0%	10.7%	10.5%
CH 5	4.4%	5.5%	4.5%	5.2%	3.5%	4.3%	4.5%	5.6%
OTHER	11.7%	12.6%	15.6%	17.0%	22.2%	24.4%	10.0%	10.8%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 16+		Young Adults 16–34		Children 4–15		Housewives	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6–19h	19–23h	6–19h	19–23h	6–19h	19–23h	6–19h	19–23h
BBC 1	28.8%	29.2%	24.9%	28.5%	26.0%	27.6%	29.1%	29.7%
BBC 2	12.9%	9.4%	11.1%	8.3%	10.8%	7.4%	12.4%	9.1%
ITV	26.3%	38.2%	27.5%	35.7%	23.6%	35.5%	27.9%	39.5%
CHANNEL 4	12.8%	8.0%	11.7%	9.3%	8.0%	6.9%	13.0%	8.0%
CHANNEL 5	5.0%	5.5%	5.0%	4.8%	3.6%	4.9%	5.4%	5.4%
OTHER	14.2%	9.8%	19.9%	13.4%	28.1%	17.7%	12.2%	8.4%

Source: TNSofres/BARB

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
CORONATION STREET	UK	ITV	Series-Daily Soap	19:31	07/03	38.7%	69.0%
WHO/BE A MILLIONAIRE	UK	ITV	Quiz Show	20:32	07/03	37.6%	67.0%
TOUCH OF FROST	UK	ITV	Series-Crime	20:02	21/03	35.0%	62.0%
HEARTBEAT	UK	ITV	Series-Family	20:00	28/02	33.6%	62.0%
FBAL CL/LGE FINAL	UK	ITV	Sport	19:30	26/05	30.4%	62.0%
EASTENDERS	UK	BBC 1	Series-Daily Soap	19:31	07/01	30.3%	61.0%
FBAL CL	UK	ITV	Sport	19:31	17/11	28.5%	54.0%
VICAR OF DIBLEY	UK	BBC 1	Sitcom	21:00	27/12	28.0%	51.0%
WALKING WITH DINOSAU	UK	BBC 1	Docum.	20:29	04/10	27.7%	51.0%
EMMERDALE	UK	ITV	Series-Daily Soap	18:59	20/01	26.7%	58.0%
NEW YOU'VE/FRAMED	UK	ITV	Entertain.	20:02	07/11	26.1%	50.0%
GOLDENEYE	USA	ITV	Movie	20:37	10/03	25.8%	52.0%
NEIGHBOURS FROM HELL	UK	ITV	Docum.	20:31	07/01	25.5%	48.0%
TV NIGHTMARES	UK	ITV	Entertain.	21:03	09/01	25.5%	49.0%
2000 TODAY	UK	BBC 1	Entertain.	17:32	31/12	25.2%	59.0%
LOST FOR WORDS	UK	ITV	Drama	20:32	03/01	25.2%	46.0%
CASUALTY	UK	BBC 1	Drama	20:05	13/02	25.0%	51.0%
FORGOTTEN	UK	ITV	Drama	21:02	01/03	24.9%	47.0%
MISSION IMPOSSIBLE	USA	BBC 1	Movie	21:01	26/12	24.7%	50.0%
COMIC RELIEF/LAUNCH	UK	BBC 1	Entertain.	19:28	04/02	24.4%	55.0%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
GOLDENEYE	USA	ITV	20:37	10/03	25.8%	52.0%
MISSION IMPOSSIBLE	USA	BBC 1	21:01	26/12	24.7%	50.0%
TOMORROW NEVER DIES	UK	ITV	20:05	13/10	22.9%	45.0%
THE SPECIALIST	USA	ITV	21:04	11/03	21.9%	47.0%
ALL THE KINGS MEN	USA	BBC 1	21:02	14/11	20.5%	39.0%
TWISTER	USA	ITV	20:05	06/10	20.5%	42.0%
DR. NO	UK	ITV	20:35	02/06	19.8%	42.0%
NEVER SAY NEVER AGAIN	UK	ITV	20:04	18/08	19.5%	43.0%
APOLLO 13	USA	BBC 1	20:03	01/01	19.5%	37.0%
THE NUTTY PROFESSOR	USA	ITV	20:09	01/12	19.5%	43.0%

Source: TNSofres/BARB

TOP 10 SPORT EVENTS						
Title		Channel	Start. Time	Date	Audience	Share
FBAL CL/LGE FINAL		ITV	19:30	26/05	30.4%	62.0%
FBAL CL		ITV	19:31	17/11	28.5%	54.0%
FBAL CL		ITV	19:31	03/03	22.9%	45.0%
FBAL CL		ITV	19:35	17/03	22.1%	46.0%
FBAL CL		ITV	19:35	07/04	22.0%	46.0%
FBAL CL		ITV	19:35	21/04	21.6%	44.0%
HORSE RACING/GR. NATIONAL		BBC 1	15:45	10/04	20.1%	66.0%
FBAL CL		ITV	19:31	29/09	19.0%	41.0%
FBAL CL		ITV	14:58	22/05	18.6%	64.0%
FBAL CL		ITV	19:30	08/12	18.4%	41.0%

Source: TNSofres/BARB

Top Programmes Channel by Channel

BBC 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
EASTENDERS	UK	Soap	52	20:00	29	25.0%	50.0%
CASUALTY	UK	Magazine	35	20:05	52	18.9%	39.0%
ANTIQUES ROADSHOW	UK	Magazin	25	18:36	45	18.2%	40.0%
THIS IS YOUR LIFE	UK	Family Show	18	19:00	30	18.2%	40.0%
GROUND FORCE	UK	Magazine	29	20:00	30	17.5%	38.0%
HOLBY CITY	UK	Series	15	20:00	56	17.4%	34.0%
SUNBURN	UK	Series	6	20:55	51	16.9%	34.0%
WIVES AND DAUGHTERS	UK	Series	4	21:03	77	16.7%	30.0%
JONATHAN CREEK	UK	Series	11	21:05	50	16.7%	35.0%
WE'VE GOT/NUMBER	UK	Quiz Show	12	19:51	25	16.3%	39.0%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MISSION IMPOSSIBLE	USA	Movie	26/12	21:01	104	24.7%	50.0%
INTO THE MILLENNIUM	UK	Docum.	31/12	23:50	70	21.0%	60.0%
ALL THE KINGS MEN	USA	Movie	14/11	21:02	110	20.5%	39.0%
TRIBUTE/JILL DANDO	UK	Docum.	26/04	21:37	27	20.4%	40.0%
ONE HOUR TO GO...	UK	Entertain.	31/12	23:00	50	20.3%	56.0%
H.ENFIELD/KEVIN/TNGR	UK	Entertain.	27/12	21:41	39	20.1%	42.0%
HORSE RACING/GR. NATIONAL	UK	Sport	10/04	15:45	20	20.1%	66.0%
APOLLO 13	USA	Movie	01/01	20:03	132	19.5%	37.0%
THE ROYAL WEDDING	UK	Current Affairs	19/06	16:00	141	19.1%	51.0%
FBAL EURO 2000 SCOT-ENG	UK	Sport	13/11	15:55	107	18.3%	54.0%

Source: TNSofres/BARB

BBC 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
CHARLIES GARDEN ARMY	UK	Magazine	4	20:30	30	9.7%	21.0%
MERSEY BLUES	UK	Docum.	5	21:01	50	8.1%	16.0%
SECRETS OF/ANCIENTS	UK	Docum.	4	21:00	50	7.8%	16.0%
GARDENERS WORLD	UK	Magazine	34	20:31	28	7.8%	18.0%
LIVING BRITAIN	UK	Docum.	6	18:00	49	7.5%	18.0%
HOME FRONT	UK	Magazine	23	20:31	30	7.1%	15.0%
WORLD ATHLETICS 99		Sport	12	21:00	139	7.0%	19.0%
GARY RHODES	UK	Magazine	7	20:00	29	6.9%	14.0%
HAVE I GOT NEWS FOR YOU	UK	Quiz Show	42	21:00	30	6.8%	16.0%
MURDER MOST HORRID	UK	Comedy	8	21:01	30	6.7%	14.0%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
J.PATTERSON/FAT LADY	UK	Docum.	21/12	21:31	39	9.7%	20.0%
NAKED CHEF	UK	Leisure	21/12	21:01	30	9.5%	20.0%
IN THE HEAT/NIGHT	USA	Movie	06/03	21:06	106	8.9%	20.0%
GARDENER/YEAR FINAL	UK	Leisure	20/12	21:30	60	8.2%	17.0%
PYTHONLAND	UK	Entertain.	09/10	21:54	19	8.2%	19.0%
WORLD DARTS FINAL	UK	Sport	10/01	18:00	116	8.2%	17.0%
SECRET/VIKING VOYAGE	UK	Docum.	02/11	20:59	51	8.1%	16.0%
LIFE OF BRIAN	UK	Movie	09/10	22:18	90	7.8%	26.0%
FACE	UK	Movie	05/04	22:03	103	7.6%	21.0%
LOST ON EVEREST	UK	Docum.	21/10	21:00	50	7.3%	18.0%

Source: TNSofres/BARB

ITV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
CORONATION STREET	UK	Soap	52	19:32	27	31.5%	66.0%
HEARTBEAT	UK	Series	23	20:01	58	28.4%	52.0%
WHO/BE A MILLIONAIRE	UK	Quiz Show	52	20:02	40	26.5%	51.0%
EMMERDALE	UK	Soap	52	19:00	28	22.5%	54.0%
TOUCH OF FROST	UK	Series	16	20:01	115	21.9%	45.0%
LONDON'S BURNING	UK	Series	8	21:03	58	21.8%	42.0%
WHO/XMAS MILLIONAIRE	UK	Quiz Show	4	21:03	29	20.8%	42.0%
PEAK PRACTICE	UK	Series	26	21:01	57	20.0%	37.0%
THE VICE	UK	Series	6	21:01	58	20.0%	39.0%
NEW YOU'VE/FRAMED	UK	Family Show	11	20:02	26	19.9%	42.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CL/LGE FINAL		Sport	26/05	19:30	n.a.	30.4%	62.0%
FBAL CL		Sport	17/11	19:31	n.a.	28.5%	54.0%
GOLDENEYE	USA	Movie	10/03	20:37	142	25.8%	52.0%
FORGOTTEN	UK	Series	15/02	21:01	58	24.4%	47.0%
TOMORROW NEVER DIES	UK	Movie	13/10	20:05	129	23.0%	45.0%
STARS IN THEIR EYES - FINAL	UK	Family Show	05/06	19:30	89	23.0%	52.0%
FBAL CL		Sport	03/03	19:31	n.a.	22.9%	45.0%
RHINOCEROS	UK	Drama Play	11/04	21:05	114	22.8%	46.0%
GARAGES FROM HELL	UK	Docum.	13/01	21:01	59	22.7%	45.0%
THE SPECIALIST	USA	Movie	11/03	21:04	115	21.9%	47.0%

Source: TNSofres/BARB

CHANNEL 4							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
COUNTDOWN	UK	Quiz Show	254	16:29	26	7.1%	38.0%
SECRETS OF THE DEAD	USA	Docum.	6	21:01	57	6.9%	15.0%
UNIVERSE	USA	Docum.	4	21:01	57	6.5%	13.0%
THE CORONER	UK	Docum.	5	21:01	53	5.9%	12.0%
PORNOGRAPHY	USA	Art	6	22:31	57	5.7%	17.0%
MAY DAY	USA	Docum.	4	21:01	56	5.6%	11.0%
TIME TEAM	UK	Quiz Show	18	18:00	58	5.5%	14.0%
FATHER TED	UK	Sitcom	24	22:02	30	5.2%	13.0%
FRIENDS	USA	Sitcom	96	18:00	26	5.2%	13.0%
E.R.	USA	Series	26	21:04	56	5.2%	11.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MERLIN	USA	Series	04/04	18:12	106	9.7%	21.0%
BRASSED OFF	UK	Movie	25/10	22:03	115	9.2%	31.0%
FOUR WEDDINGS	UK	Movie	30/05	21:04	127	9.1%	23.0%
MICHAEL	USA	Movie	12/12	21:03	112	8.9%	17.0%
REAL STORY/AIRTOURS	USA	Docum.	24/02	22:31	27	8.5%	24.0%
REAL PRINCE PHILIP	UK	Docum.	28/06	21:01	58	8.0%	17.0%
SHAWSHANK REDEMPTION	USA	Movie	21/03	22:05	152	8.0%	32.0%
RISING SUN	USA	Movie	05/12	22:03	140	7.9%	27.0%
FULL METAL JACKET	USA	Movie	05/09	22:02	123	7.4%	26.0%
THE NET	USA	Movie	28/03	22:04	121	7.3%	26.0%

Source: TNSofres/BARB

CHANNEL 5							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FBAL EURO 2000		Sport	7	19:31	131	3.9%	11.0%
SERIAL KILLERS	USA	Docum.	5	23:01	48	3.7%	15.0%
AUTOPSY	USA	Docum.	5	23:01	45	3.4%	15.0%
FBAL UEFA CUP		Sport	6	19:30	145	3.4%	8.0%
MIND TO KILL	UK	Series	13	21:01	106	3.1%	7.0%
MARTIAL LAW	USA	Series	22	19:59	50	2.9%	6.0%
FBAL INTERNATIONAL		Sport	5	19:39	114	2.8%	8.0%
ROAD RAGES	USA	Docum.	6	20:30	26	2.8%	5.0%
SEX AND SHOPPING	USA	Docum.	13	23:38	27	2.7%	16.0%
HOUSE DOCTOR	USA	Magazin	12	20:30	26	2.6%	6.0%

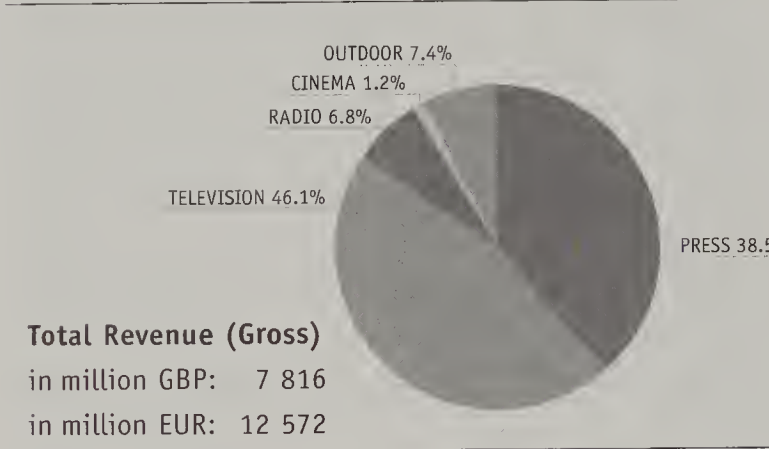
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
INDEPENDENCE DAY	USA	Movie	07/09	21:03	148	10.9%	25.0%
FBAL EURO 2000		Sport	08/09	19:02	112	8.9%	20.0%
BROKEN ARROW	USA	Movie	23/03	21:04	111	7.3%	16.0%
LONG KISS GOODNIGHT	USA	Movie	12/10	21:03	120	7.0%	16.0%
MARKED FOR DEATH	USA	Movie	08/04	22:01	100	6.7%	20.0%
MONEY TRAIN	USA	Movie	25/05	21:03	106	6.3%	15.0%
RAW DEAL	USA	Movie	06/09	21:03	110	6.2%	14.0%
ENFORCER	USA	Movie	01/06	21:02	103	5.8%	13.0%
PHENOMENON	USA	Movie	18/11	21:01	131	5.7%	13.0%
MAGNUM FORCE	USA	Movie	18/03	21:35	126	5.6%	16.0%

Source: TNSofres/BARB

Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million GBP)	7 816
Total adspend (in million USD)	12 629
Total adspend (in million EUR)	12 572
TV adspend (in million GBP)	3 600
TV adspend (in million USD)	5 817
TV adspend (in million EUR)	5 791
TV adspend in % of GDP	0.46
TV adspend per capita (USD)	99.2

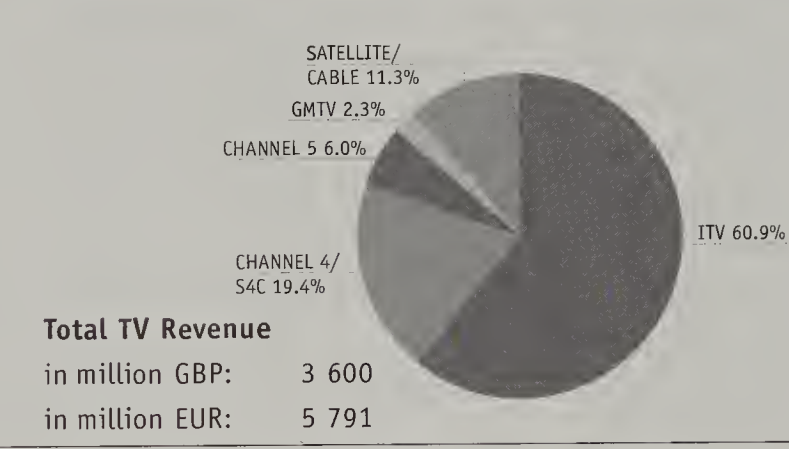
SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



TV ADVERTISING STATISTICS	
Total number of spots broadcast	6 209 124
Average spot length (in sec.)	24.7
Total number of advertisers	n.a.
Number of TV advertisers	n.a.
Total number of advertised products	n.a.
Number products advertised on TV	n.a.

Source: AC Nielsen, MMS Multimedia

SHARE OF TV ADVERTISING REVENUE	
Channels: Advertising Market Share in %	



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
FOOD	688	523	76.0%	14.5%
MOTORS	948	446	47.0%	12.4%
RETAIL	1 027	440	42.8%	12.2%
ENTERTAINMENT & MEDIA	607	290	47.8%	8.0%
COSMETICS & TOILETRIES	410	274	66.8%	7.6%
DRINK	353	255	72.3%	7.1%
BUSINESS & INDUSTRIAL	564	248	43.9%	6.9%
FINANCE	669	241	36.0%	6.7%
HOUSEHOLD STORES	255	208	81.2%	5.8%
LEISURE EQUIPMENT	295	176	59.7%	4.9%
OTHER	1 999	500	25.0%	13.9%
TV Advertisers				
PROCTER & GAMBLE	165	134	81.1%	3.7%
L'OREAL GOLDEN LTD	67	56	83.9%	1.6%
RENAULT UK	84	46	54.7%	1.3%
VAN DEN BERGH	53	46	86.5%	1.3%
KELLOGGS	53	46	85.8%	1.3%
MARS	64	45	70.5%	1.2%
COI (CENTRAL OFFICE OF INFORMATION)	92	45	48.5%	1.2%
BT-BRITISH TELECOM	84	44	51.8%	1.2%
VAUXHALL	84	44	51.9%	1.2%
FORD	57	34	59.3%	0.9%
OTHER	7.012	3.061	43.7%	85.1%
Total (in million GBP)	7 816	3 600	46.1%	100.0%
Total (in million EUR)	12 572	5 791	46.1%	100.0%

Source: MMS Multimedia

Central/Eastern Europe

The main tendencies of the Byelorussian media market development in 1999 have been defined by two related circumstances. The first of them is a 30–40% reduction of the advertising budget. The second point is a noticeable increase in advertisers’ requirements concerning the quality and the efficiency of advertising campaigns.

1999 was marked by the following important event for the media market: blocks of Byelorussian advertisements began to appear and occupied advertising space on the Russian TV channels, which are broadcasted in Belarus. During 1999, the National State Television and Radio Company of Belarus began cutting out advertising blocks from the channels ORT and RTR which broadcast to the territory of the Republic. Since August 1st, the Television Company “NTV” and Ministry of Communications of Belarus have been cutting off advertising breaks that the “NTV” channel broadcasts to the territory of Belarus. On account of this, the monopoly of Byelorussian TV to broadcast television advertisements in Belarus has disappeared. The process of reducing prices for TV advertising seems to have taken place in the Byelorussian media market sphere. TV has become open and accessible for the local advertisers who used to only co-operate with radio channels.

The total volume of capital investments in advertising in 2000 is likely to remain on the level of 1999. Along with this, the total number of local TV advertisers may essentially increase. The stability of rates for advertising activity will be the specific feature for the Byelorussian media market in 2000. These have reached the bottom and there are no favourable economic conditions for them to be able to grow.

In comparison with 1998, the total gross media expenditure in 1999 more than doubled (4.06 mln. USD in 1998, and 9.27 mln.USD in 1999). This may be explained by the following innovation – the most popular Russian TV channels (ORT, RTR, NTV) which accumulate the largest audience share offered the possibility to Byelorussian advertisers to broadcast on their channels. As a result, a redistribution of advertising budgets took place between the various channels. In 1998, all advertising budgets were located on BTV channel, in 1999 ORT possessed 45.2% advertising budget, NTV – 47.6%, and only 6.7% advertising budget belonged to BTV.

The structure of the leading advertisers has also changed. In 1998, the advertising budget top 10 belonged to foreign companies (Dandy Chewing Gum, Colgate-Palmolive, Philip Morris, Wrigley, Van Melle, etc.), 1999 brought a new list of top 10 advertisers including both foreign advertisers and local Byelorussian producers (Modum, Pushe, Palas). There were privileged commercial-time buying conditions for Byelorussian producers in 1999. All channels lowered the cost of advertising time and gave high discounts (up to 90%). This allowed Byelorussian producers to conduct advertising activity on an equal footing with the large foreign companies.

Belarus

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General Data

COUNTRY	
Land area (km ²)	207 600
Total population	10 045 000
Number of households	3 348 333
Average household size	3.0
In % of households equipped	
Phone	67.0*
Mobile telephone subscribers	n.a.
PC's	n.a.
Internet access	n.a.
Internet users	n.a.

Source: Statistical Year-Book of the Republic of Belarus '98 *data from 1998

ECONOMICS	
GDP in billion BYR (at current prices)	662 370
GDP per capita in BYR (at current prices)	64 688 000
Inflation rate in 1999 (in %)	172.0
Value of BYR in Euro (EUR)	1 EUR = 255 935 BYR*
Value of BYR in US-Dollar (USD)	1 USD = 253 000 BYR*

*Average rate '99

TV OVERVIEW	
Total number of TV households (TVHH)	3 093 027
In % of all households	92.4
Numbers of channels received by 70% of the population	3
TV License-Fee cost per year	none

TV EQUIPMENT*	
	in % of TVHH
Colour TV	78.0
Multiset (homes with more than 1 TV set)	24.0
VCR	12.0
Teletext	n.a.
Remote control	21.0

*data from 1998

TV DISTRIBUTION*		
		in % of TVHH
Cable	passed	n.a.
	connected	12.0
Satellite	private dish/DTH	5.0
	collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

Sources: MMI Ukraine, Studio 1+1 research department

*data from 1998

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
BTV	1956	T	98.0%	Russian/Bye	126	Generalist	L-F, Adv., Gvt.	In-house

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TBN	1995	T	42.0%	Russian	49	Movie	Adv.	In-house
8TH CHANNEL	1996	T, C	17.0%	Russian	48	Movie, Music	Adv.	In-house

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
EUROSPORT	Private	C, S	n.a.	German/English	Sport	Adv.

Source: IP Minsk

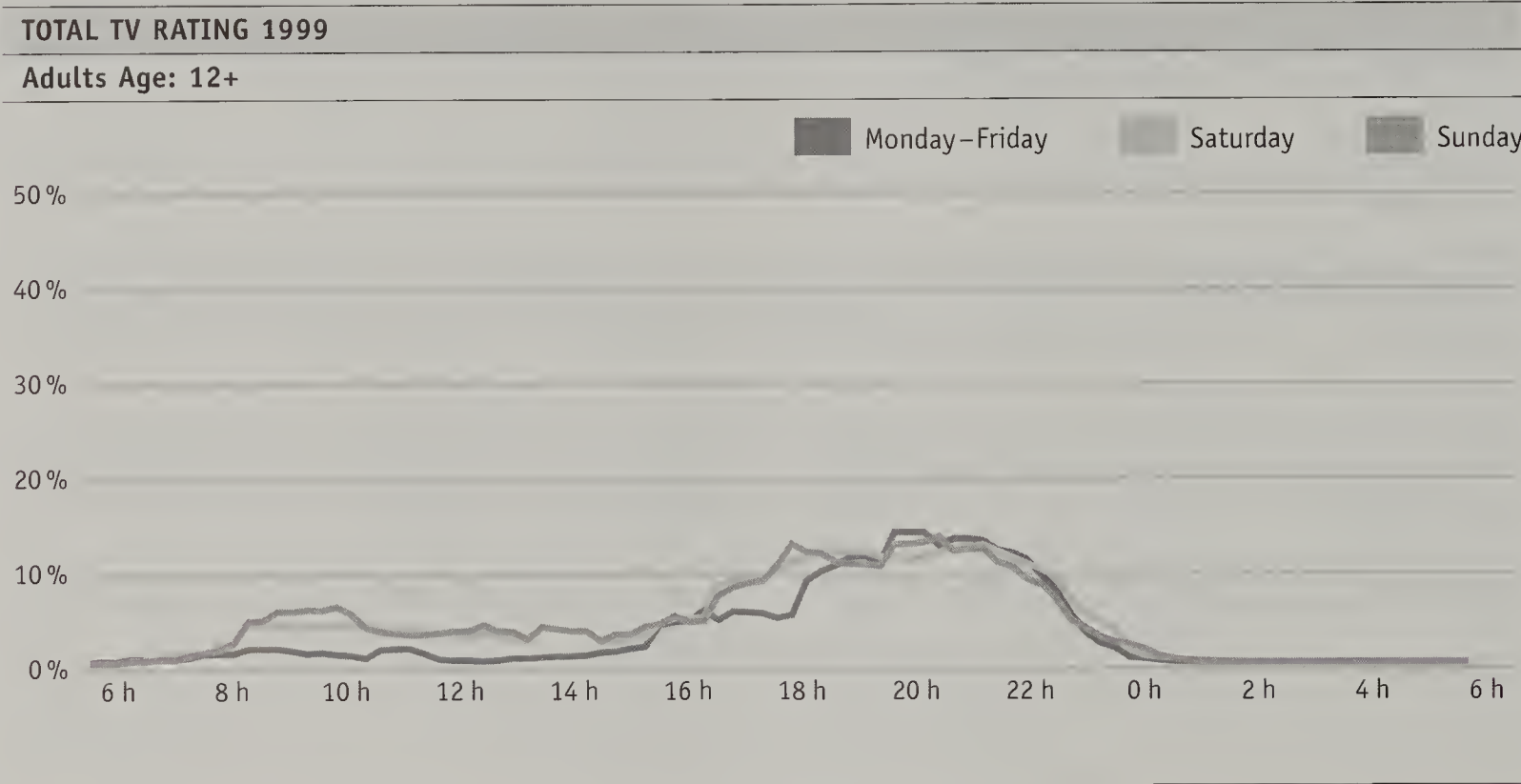
OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ORT	Public	T	98.0%	Russian	Generalist	L-F, Adv.
RTR	Public	T	73.0%	Russian	Generalist	L-F, Adv.
NTV	Private	T	38.0%	Russian	Generalist	Adv.
CH. CULTURE	Public	T	45.0%	Russian	Generalist	L-F.
TV 6 MOSCOW	Private	C, S	n.a.	Russian	Generalist	Adv.
TV CENTRE	Public	C, S	n.a.	Russian	Generalist	Adv.
AST	Private	C, S	n.a.	Russian	Generalist	Adv.

Source: IP Minsk

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	Research Laboratory, Novak	
Panel/Sampling Size	1668 individuals	
Instrument used (people-meter, telefon, face-to-face)	Diary	
	Population size in 000	
Adults 12+	8 630	
Housewives	2 850	
Young Adults 12–34	3 474	

Sources: Research Laboratory; Novak; (November 1999), IP Minsk



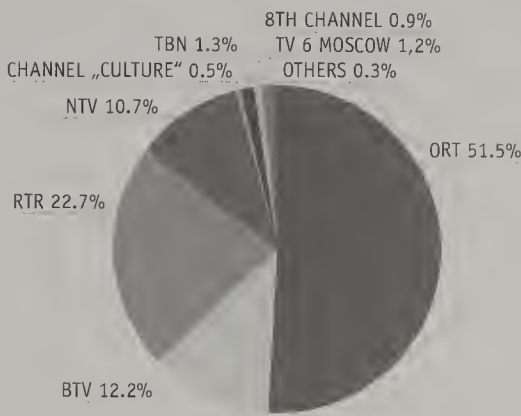
DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)									
	Adults 12+			Young Adults 12–34			Housewives		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	n.a.	93.0	94.0	n.a.	92.0	94.0	n.a.	94.0	97.0
Viewing time per Viewer	n.a.	227	n.a.	n.a.	226	n.a.	n.a.	248	n.a.
Viewing time per Individual	n.a.	224	n.a.	n.a.	222	n.a.	n.a.	245	n.a.

Sources: Research Laboratory, Novak, IP Minsk

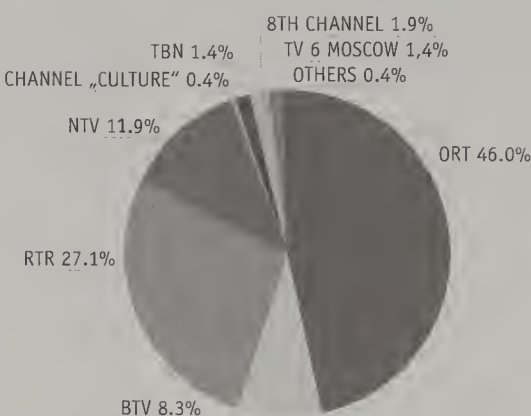
Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS

Adults 12+, all day (03:00–03:00)



Young Adults 12–34, all day (03:00–03:00)



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 03:00 – 03:00

	Adults 12+		Young Adults 12–34		Main Purchase Responsibles		Housewives	
	1998	1999	1998	1999	1998	1999	1998	1999
ORT	49.4%	51.5%	45.7%	46.0%	53.0%	n.a.	n.a.	49.8%
BTV	9.9%	12.2%	8.4%	8.3%	10.0%	n.a.	n.a.	10.5%
RTR	20.2%	22.7%	20.6%	27.1%	19.0%	n.a.	n.a.	22.8%
NTV	13.8%	10.7%	17.3%	11.9%	12.0%	n.a.	n.a.	10.2%
CH. CULTURE	1.0%	0.5%	1.0%	0.4%	1.0%	n.a.	n.a.	0.8%
TBN	2.6%	1.3%	3.7%	1.4%	2.0%	n.a.	n.a.	1.8%
8TH CHANNEL	0.5%	0.9%	0.1%	1.9%	0.5%	n.a.	n.a.	2.0%
TV 6 MOSCOW	n.a.	1.2%	n.a.	1.4%	n.a.	n.a.	n.a.	1.0%
OTHERS	2.6%	0.3%	3.2%	0.4%	2.5%	n.a.	n.a.	0.4%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS

	Adults 12+		Young Adults 12–34		Housewives	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6–18 h	18–23 h	6–18 h	18–23 h	6–18 h	18–23 h
ORT	48.5%	51.2%	46.6%	45.2%	47.2%	51.1%
BTV	11.6%	10.9%	8.1%	7.0%	12.2%	8.0%
RTR	25.1%	22.9%	29.4%	28.6%	25.5%	23.5%
NTV	11.6%	10.1%	11.8%	12.3%	12.8%	9.4%
CH. CULTURE	0.7%	0.5%	0.6%	0.4%	0.9%	0.6%
TBN	0.3%	1.4%	0.5%	1.5%	0.4%	2.2%
8TH CHANNEL	0.2%	0.9%	0.3%	2.2%	0.4%	2.7%
TV 6 MOSCOW	1.4%	1.0%	1.7%	1.2%	0.6%	1.0%
OTHERS	0.2%	0.4%	0.3%	0.4%	0.1%	0.5%

Sources: Research Laboratory; Novak; IP Minsk

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
CLUB OF BRIGHT AND ADROIT MEN	Russia	ORT	Entertainment	20:45	07/11	39.5%	67.4%
WHITE DESERT SUN	Russia	ORT	Movie	18:20	28/11	36.8%	66.8%
FIELD OF MIRACLE	Russia	ORT	Entertainment	18:45	05/11	36.1%	61.9%
TIME	Russia	ORT	News	20:00	28/11	35.4%	71.6%
BUDULAI'S RETURN	Russia	ORT	Series	18:40	18/11	30.4%	71.1%
NOTHING TO LOOSE	USA	ORT	Movie	18:10	21/11	30.1%	65.3%
GIPSYMAN	Russia	ORT	Series	18:40	23/11	30.1%	75.1%
POLICEMAN ON THE WALK	France	ORT	Movie	18:10	13/11	29.8%	58.2%
X-FILES	USA	ORT	Series	21:00	15/11	29.6%	57.0%
COLONEL ZORIN'S VERSION	Russia	ORT	Movie	20:45	12/11	28.4%	50.7%
ITALIAN MARRIAGE	Italy	ORT	Movie	18:10	06/11	27.9%	58.4%
UNDER SIEGE	USA	ORT	Movie	21:05	28/11	27.5%	63.9%
FOOTBALL REVIEW	Russia	ORT	Sport	22:30	07/11	27.4%	71.1%
A GIRL WITHOUT AN ADDRESS	Russia	ORT	Movie	21:10	23/11	27.1%	47.5%
BLACK DOG	USA	ORT	Movie	18:20	14/11	26.5%	60.4%
RICHY RICH	USA	ORT	Movie	18:20	27/11	26.2%	57.1%
ON THE CORNER OF THE PATR. PONDS	Russia	ORT	Series	18:45	04/11	25.7%	66.9%
TASTY STORIES	Russia	ORT	Entertainment	18:25	12/11	22.3%	65.2%
MY FAMILY	Russia	RTR	Talk Show	17:00	20/11	19.4%	63.6%
FAST 34TH	Russia	RTR	Movie	20:45	04/11	18.3%	33.8%

*OF DEREBASSOVSKA

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
WHITE DESERT SUN	Russia	ORT	18:20	28/11	36.8%	66.8%
NOTHING TO LOOSE	USA	ORT	18:10	21/11	30.1%	65.3%
POLICEMAN ON THE WALK	France	ORT	18:10	13/11	29.8%	58.2%
COLONEL ZORIN'S VERSION	Russia	ORT	20:45	12/11	28.4%	50.7%
ITALIAN MARRIAGE	Italy	ORT	18:10	06/11	27.9%	58.4%
UNDER SIEGE	USA	ORT	21:05	28/11	27.5%	63.9%
A GIRL WITHOUT AN ADDRESS	Russia	ORT	21:10	23/11	27.1%	47.5%
BLACK DOG	USA	ORT	18:20	14/11	26.5%	60.4%
RICHY RICH	USA	ORT	18:20	27/11	26.2%	57.1%
FAST 34TH	Russia	RTR	20:45	04/11	18.3%	33.8%

TOP 2 SPORT EVENTS						
Title		Channel	Start. Time	Date	Audience	Share
FBAL CL KIEV-MADRID		NTV	21:35	24/11	4.9%	13.8%
FBAL CL PRAGUE-MOSCOW		NTV	21:35	03/11	4.3%	11.7%

Sources: Novak; IP Minsk, NB: Period–November 1999

Top Programmes Channel by Channel

ORT							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FIELD OF MIRACLE	Russia	Entertainment	4	18:45	60	35.2%	72.7%
BUDULAI'S RETURN	Russia	Series	2	18:40	65	29.7%	71.1%
GIPSYMAN	Russia	Series	5	18:40	65	29.2%	73.3%
TIME	Russia	News	30	20:00	60	27.5%	50.7%
ON THE CORNER*	Russia	Series	4	18:45	60	27.1%	65.6%
X-FILES	USA	Series	5	21:00	105	26.8%	39.1%
TASTY STORIES	Russia	Entertainment	4	18:25	10	19.4%	72.7%
FOOTBALL REVIEW	Russia	Sport	4	22:30	30	18.0%	56.4%
THE MAN AND THE LAW	Russia	Crime	4	18:00	45	16.8%	58.4%
I'M LOOKING FOR YOU	Russia	Talk Show	5	18:00	40	16.4%	55.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
CLUB OF BRIGHT AND ADROIT MEN	Russia	Entertainment	07/11	20:45	60	39.5%	67.4%
WHITE DESERT SUN	Russia	Movie	28/11	18:20	100	36.8%	66.8%
NOTHING TO LOOSE	USA	Movie	21/11	18:10	110	30.1%	65.3%
POLICEMAN ON THE WALK	France	Movie	13/11	18:10	110	29.8%	58.2%
COLONEL ZORIN'S VERSION	Russia	Movie	12/11	20:45	100	28.4%	50.7%
ITALIAN MARRIAGE	Italy	Movie	06/11	18:10	110	27.9%	58.4%
UNDER SIEGE	USA	Movie	28/11	21:05	175	27.5%	63.9%
A GIRL WITHOUT AN ADDRESS	Russia	Movie	23/11	21:10	100	27.1%	47.5%
BLACK DOG	USA	Movie	14/11	18:20	100	26.5%	60.4%
RICHY RICH	USA	Movie	27/11	18:20	100	26.2%	57.1%

Sources: Novak; IP Minsk, Period – November 1999

*OF THE PATRIARCH'S PONDS

BTV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
COFFEE WITH THE FRAGRANT*	Columbia	Series–Daily Soap	22	19:50	50	13.1%	20.0%
PANORAMA	Belarus	News	26	21:00	40	8.5%	14.4%
EVENT	Belarus	News	22	21:40	20	6.7%	12.9%
HAM	Belarus	Movie	4	22:00	65	5.1%	12.0%
GOLD POPULAR SONG CONCERTS	Belarus	Music	6	21:40	60	4.8%	11.2%
COFFEE WITH THE FRAGRANT*	Columbia	Series–Daily Soap	22	11:20	50	4.4%	75.6%
CRIMINAL CHRONIQUE	Belarus	News, Crime	22	23:10	5	4.4%	18.9%
BELARUSIAN HIT-PARADE	Belarus	Music	26	23:30	15	3.0%	18.8%
EVERYTHING IS OK, MOTHER	Belarus	Entertain.	8	10:20	30	2.6%	12.1%
GOOD EVENING, BELARUS	Belarus	News	22	18:00	25	1.7%	8.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
BATALLIONS ASK FOR FIRE	Russia	Movie	16–19/11	22:00	653	6.8%	16.3%
DARK CASTLE OF OLSHANY	Belarus	Movie	22–23/11	22:00	652	6.7%	14.1%
HELLO AND GOOD-BYE	Russia	Movie	21/11	17:20	90	6.5%	15.6%
DOVE'S WINGS	USA	Movie	21/11	21:25	100	6.5%	22.0%
FIDELITY	USA	Movie	27/11	21:40	90	6.2%	16.3%
OLD RHYMES	Russia	Movie	24/11	22:00	85	5.5%	16.3%
AUGUST KING'S TRAVEL	USA	Movie	20/11	21:40	80	5.2%	11.2%
BLOODY MONEY	USA	Movie	26/11	22:00	90	4.4%	13.2%
FELLOW-COUNTRYMEN. **	Belarus	Reality	06/11	18:40	60	4.2%	8.6%
LITTLE BUDDAH	USA	Movie	28/11	21:25	135	4.1%	13.2%

Sources: Novak; IP Minsk, Period–November 1999

*OF A WOMAN, **STOLIN REGION

NTV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
STREETS OF BROKEN LANTERNS	Russia	Series–Crime	5	19:40	80	8.0%	15.6%
WOMAN'S VIEW	Russia	Talk Show	4	21:45	30	7.7%	8.0%
PROFESSION: REPORTER	Russia	Reality, Crime, News	4	19:50	70	5.8%	11.1%
COOL WALKER: TEXAS JUSTICE	USA	Series–Crime	4	19:00	50	5.6%	11.4%
CRIMINAL RUSSIA	Russia	Crime, News	4	21:45	30	5.5%	8.8%
ABSOLUT SECRET	Russia	Reality, Crime, News	5	19:55	65	5.0%	8.8%
EMERGENCY ROOM	USA	Series–Medicine	13	18:50	50	4.5%	9.8%
OH, LUCKYMAN!	Russia	Entert.–Game	4	21:45	45	4.4%	9.2%
INDEPENDENT INVESTIGATION	Russia	Reality, News	4	21:45	45	4.3%	9.0%
TODAY	Russia	News	26	21:00	45	4.2%	7.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MAGNIFICENT ANGELICA	France	Movie	27/11	19:00	120	7.8%	16.8%
PROTECTION FOR DAUGHTER	USA	Movie	05/11	22:15	120	7.1%	22.3%
DELTHA SQUAD	USA	Movie	14/11	17:35	145	6.0%	14.7%
FBAL. DINAMO KIEV–REAL MADRID		Sport	24/11	21:35	120	4.9%	13.8%
ONE CHANCE ON TWO	USA	Movie	28/11	17:50	130	4.8%	9.3%
PREDATORY BIRD	USA	Movie	01/11	19:00	120	4.8%	10.3%
FIRE RAIN	USA	Movie	21/11	17:40	140	4.6%	11.3%
CRIME ZONE	USA	Movie	13/11	19:00	120	4.6%	9.2%
FBAL CL PRAGUE–MOSCOW		Sport	03/11	21:35	120	4.3%	11.7%
DOG’S HEART	Russia	Movie	07/11	17:25	155	3.6%	9.2%

Sources: Novak, IP Minsk, Period: November 1999

RTR							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MY FAMILY	Russia	Talk Show	4	17.00	65	18.7%	53.4%
MUSICAL RING	Russia	Music	1	20.45	60	16.5%	30.6%
TWO ROYALS	Russia	Music	4	Mai 18.	55	12.8%	28.7%
PRODUCER OF HIS OWN	Russia	Entertainment	4	19.25	35	12.2%	25.2%
ANSHLAGUE & CO	Russia	Entertainment	4	19.00	60	11.6%	24.0%
FRIENDS	USA	Series-General	3	21.45	30	10.9%	20.4%
ANSHLAGUE & CO	Russia	Entertainment	4	Sep. 30.	60	9.1%	40.2%
LITTLE TOWN	Russia	Entertainment	2	19.25	35	8.6%	18.1%
NEWS	Russia	News	26	20.00	45	8.3%	17.9%
LITTLE TOWN	Russia	Entertainment	2	Oct. 30.	30	8.1%	36.2%

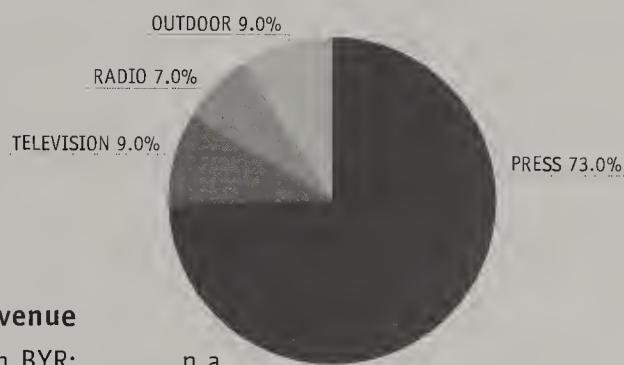
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FAST 34TH	Russia	Movie	04/11	20.45	100	18.3%	33.8%
SPORT LOTTERY-82	Russia	Movie	14/11	20.00	105	18.0%	32.7%
RED MERCURY	Russia	Movie	23/11	20.50	120	17.9%	29.6%
TEAM OF TIGERS	Russia	Movie	26/11	20.50	115	17.6%	32.1%
REVENGE	USA	Movie	19/11	20.50	105	17.3%	31.9%
COBRA	USA	Movie	20/11	20.45	100	17.3%	36.0%
7 DAYS AFTER THE MURDER	Russia	Movie	25/11	20.50	135	16.9%	34.4%
TIME TO KILL	USA	Movie	16/11	20.45	155	16.3%	36.8%
FOOLS DIE ON FRIDAYS	Russia	Movie	12/11	20.45	105	16.0%	29.1%
DOUBLE GIN	Russia	Movie	09/11	20.45	155	16.0%	33.6%

Sources: Novak, IP Minsk, Period: November 1999

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million BYR)	n.a.
Total adspend	(in million USD)	n.a.
Total adspend	(in million EUR)	n.a.
TV adspend	(in billion BYR)	2 345
TV adspend	(in million USD)	9.27
TV adspend	(in million EUR)	9.16
TV adspend	in % of GDP	0.35
TV adspend	per capita (USD)	0.90

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

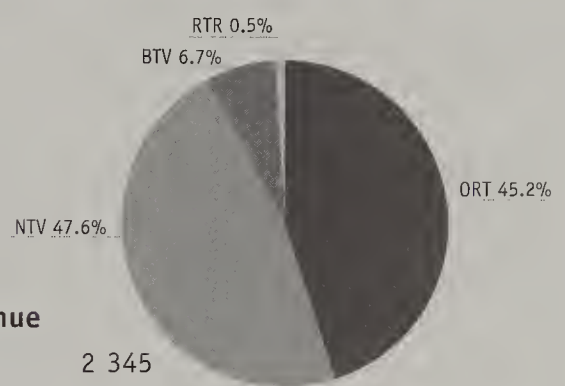


Total Revenue
in million BYR: n.a.
in million EUR: n.a.

TV ADVERTISING STATISTICS	
Total number of spots broadcast	33 947
Average spot length (in sec.)	13.84
Total number of advertisers	n.a.
Number of TV advertisers	730
Total number of advertised products	n.a.
Number products advertised on TV	393

Sources: IP Minsk Monitoring, Jan-Dec '99

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue
in billion BYR: 2 345
in million EUR: 9.16

Source: IP Minsk Monitoring, Jan-Dec '99/Magazine „Advertising World“ # 11/12/1999

TOP 10 ADVERTISING FIGURES		
TV Advertising Sectors	Television	Share of TV Expenditure
CAR, CAR EQUIPMENT	1 550 261	17.0%
SHOP	1 012 644	11.0%
TOILETRIES, COSMETICS AND PERFUMERY	607 664	7.0%
SERVICES	577 957	6.0%
DETERGENTS	383 959	4.0%
CHEWING GUM	373 734	4.0%
TOBACCO	372 804	4.0%
CONFECTIONARY	359 486	4.0%
FOOD	333 401	4.0%
IMAGE	331 703	4.0%
OTHER	3 366 393	36.0%
TV Advertisers		
MODUM	404 987	4.4%
PUSHE	266 405	2.9%
DEA	218 737	2.4%
DANDY CHEWING GUM	210 149	2.3%
PHILIP MORRIS	198 793	2.1%
WRIGLEY	198 405	2.1%
PALAS	187 034	2.0%
SHATE-M	183 796	2.0%
NIIOLE	163 807	1.8%
APIKO-FISH	161 474	1.7%
OTHER	7076 419	76.3%
Total (in USD)	9 270 006	100.0%
Total (in EUR)	9 163 707	100.0%

Source: IP Minsk Monitoring Jan-Dec '99

1999 was a year of two main trends on the TV scene: firstly the licensing and re-licensing of all TV operators, and secondly the rapid development of private operators.

According to the new Law for Radio and Television, adopted in Autumn 1998, all TV operators should pass a procedure of licensing their general program scheme. This made the operators improve their programming, and expand their penetration during the year 1999. Most of the major cable operators became candidates for a national coverage licence (more than one region, as they used to operate under the old regulations).

Private cable as well as terrestrial operators started to broadcast their channels all over the cable networks regardless of ownership. This is a relatively new phenomenon on the market. According to the old regulations of cable TV, every operator of a cable network was obliged to produce an own channel. Thus, all operators offered a package of 25 to 50 channels, in which one private Bulgarian channel was included and this used to be their own channel. In 1999, most of the cable networks started to have 5 to 10 private Bulgarian channels along with the foreign ones. At the same time, some cable operators gave up producing own programmes and limited their activity solely to the construction of cable networks. The separation of TV programming from cable network construction as a consequence of the new Law led to the re-naming of some of the leading cable channels (Den was formerly Union Television, Kanal 3 from Sofia Cabel, M Sat from Mustang Sat, etc.).

This trend, which started in the second half of 1998, developed strongly in 1999 and made the urban population of the country aware of several cable channels together with the two main regional terrestrial channels, Nova TV and 7 Dni. The following cable channels managed to gain an average daily reach of about 2-3 percent and over: Evrocom, Kanal 3, Den, MM, Diema +, M Sat, Bulgaria Cabel.

The whole of 1999 has been a year of preparing for and participating in the licensing procedure. At the end of the year and during the first quarter of 2000, it was still not clear who will win what kind of licence. Except for one – the first private terrestrial operator with a licence for national coverage. In autumn 1999, a tender for a national terrestrial private licence was held, and Murdok's bTV won from among a dozen candidates. This channel is to receive the frequencies of the national state-owned Efir 2 of Bulgarian National Television and is expected to start broadcasting on September 1st, 2000.

With the start of the first private national terrestrial TV channel and the licensing of few cable channels, the TV landscape in 2000 will drastically change. The ownership of cable networks also started to be transformed at the very end of 1999. A large foreign investor bought the two biggest cable networks – Union Television and Globo – and gained ownership in cable networks in 32 big cities and towns throughout the country.

Private channels managed to improve their programming in 1999 not only as a result of the licensing procedure, but as a result of the restriction of advertising on the two state-owned channels of Bulgarian National Television (Kanal 1 and Efir 2) in prime time. The new Law for Radio and Television from the autumn of 1998 limited the advertising on the national public channels between 19.30 and 22.00 p.m. to sponsorship only. This restriction caused a drastic flow of advertising from the public to the private channels, and to especially Nova TV, the regional private leader.

News of 1999 is the first Bulgarian satellite channel – Bulgaria TV – a channel of the state-owned Bulgarian National Television. It started with a 6-hour daily programme in the middle of the year. On January, 1-st, 2000, Kanal 1 of the Bulgarian National Television started to broadcast a 24-hour programme. It is the second terrestrial channel of 24-hour programme after Nova TV, which extended its programme in August, 1998.

It is worth noting that a trend of specialized channels has been emerging in 1999. While there was only one specialized channel during almost the whole of 1998 – MM, a music channel; a couple of new specialized channels appeared during 1999. All these specialized channels are distributed via cable.

Another important issue for the development of the TV market in Bulgaria coming from the new Law is the obligation for every TV channel to transmit local productions from independent producers for about 10 percent of their total airtime. This obligation made Kanal 1 include about 30 programmes from independent producers in its scheme, some of which are among the top regular programmes of 1999.

There is still no Pay-TV market in Bulgaria. Digital transmission is not popular, but Internet is rapidly growing. From 1.2 percent of households in 1998, it has increased to almost 6.0 percent of households in 1999.

Kanal 1 remained the favourite channel nationwide, with its strong prime time programming of news, films, sports and magazine programmes. But, for the first time, this is not so among the audience of the biggest cities where private regional terrestrial and cable channels have started to dominate in the prime time.

Bulgaria

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General Data

COUNTRY	
Land area (km ²)	111 900
Total population	8 340 000
Number of households	2 920 000
Average household size	2.9
In % of population equipped	
Phone	74.6*
Mobile telephone subscribers	2.1
PC's	6.2
Internet access	3.4
Internet user	4.5**

Sources: National Statistical Institute. NOEMA LTD

*% of households

**Base: 15+, GfK-Bulgaria

ECONOMICS	
GDP in million BGL ¹	22 010
GDP per capita in BGL	2 674.2
Inflation rate in 1999 (in %)	5.5
Value of BGL in Euro (EUR)	1 EUR = 1.79 BGL
Value of BGL in US-Dollar (USD)	1 USD = 1.77 BGL

¹In 1999 Bulgarian currency was denominated.

Since 05/07/1999 1 new BGL = 1 DM = 1000 old BGL

TV OVERVIEW	
Total number of TV households (TVHH)	2 750 000
In % of all households	94.3
Numbers of channels received by 70% of the population	2
TV License-Fee cost per year	none

TV EQUIPMENT	
	in % of TVHH
Colour TV	86.9
Multiset (homes with more than 1 TV set)	12.5
VCR	43.7
Teletext	10.0
Remote control	44.1

Source: NOEMA LTD.

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	71.0
	connected	49.5
Satellite	private dish/DTH	9.4
	collective dish/SMATV	n.a.
Terrestrial	analog	94.3
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

Source: NOEMA LTD.

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
KANAL 1	1959	T, C	98%	Bulgarian	107	Generalist	Gvt, Adv.	In-house
EFIR 2	1992	T, C	85%	Bulgarian	47	Generalist	Gvt, Adv.	In-house
TV BULGARIA	1999	T, S, C	100%	8 Eur. Lang.	95	Generalist	Gvt, Adv.	In-house

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
NOVA TV	1994	T, C	32%	Bulgarian	168	Generalist	Adv.	In-house
7 DNI	1995	T, C	28%	Bulgarian	129	Generalist	Adv.	In-house
EVROCOM	1997	C	16%	Bulgarian	168	Generalist	Adv.	In-house
DEN	1995	C	14%	Bulgarian	112	Generalist	Adv.	In-house

Source: NOEMA LTD.

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
MTV	Private	C, S	29%	English	Music	Adv.
FOX KIDS	Private	n.a.	n.a.	n.a.	Children	n.a.
ANIMAL PLANET	Private	S	n.a.	English	Documentary	Adv.
BBC WORLD	Private	C, S	4%	English	News	Adv.
EUROSPORT	Private	C, S	36%	English	Sport	Adv.
SKY NEWS	Private	n.a.	n.a.	n.a.	News	n.a.
DISCOVERY	Private	S	n.a.	English	Documentary	Adv.
EURONEWS	Private	C, S	21%	English	News	Adv.
TV 5	Public	C, S	9%	French	Generalist	L-F, Spon.

Source: NOEMA LTD.

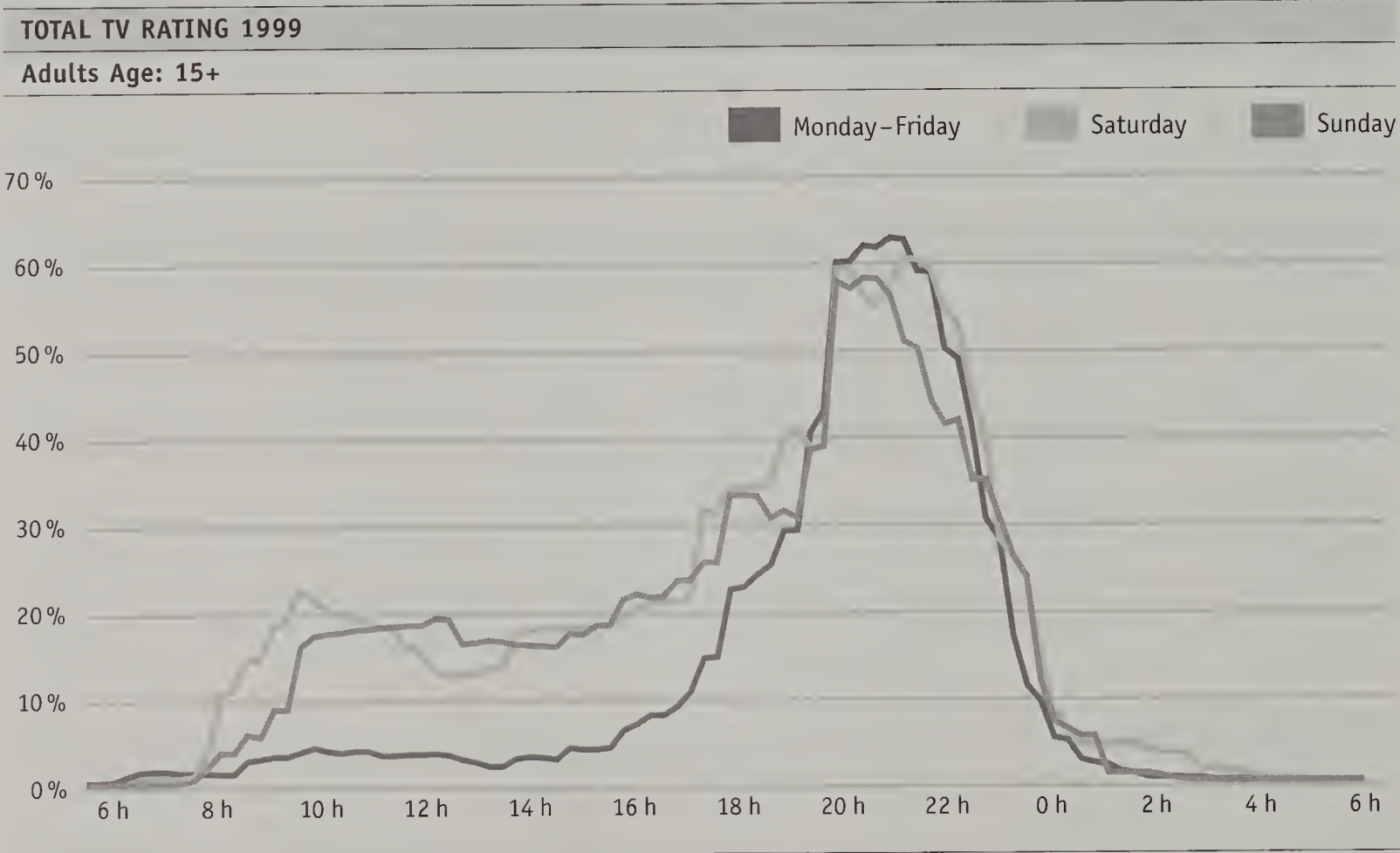
OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
SAT 1	Private	C, S	19%	German	Generalist	Adv.
RTL	Private	C, S	27%	German	Generalist	Adv.
PRO 7	Private	C, S	21%	German	Generalist	Adv.
RAI UNO	Public	S	n.a.	Italian	Generalist	L-F, Adv.
RAI DUE	Public	S	n.a.	Italian	Generalist	L-F, Adv.
RAI TRE	Public	S	n.a.	Italian	Generalist	L-F, Adv.
RTL 2	Private	S	n.a.	German	Generalist	Adv.
TM 3	Private	n.a.	n.a.	German	Generalist	Adv.

Source: NOEMA LTD.

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	NOEMA LTD.	
Panel/Sampling Size	600 households	
Instrument used (people-meter, telefon, face-to-face)	Diary	
	Population size in 000	
Adults 15+	6 390	
Main Purchase Responsibles	3 230	
Young Adults 18–29	1 380	

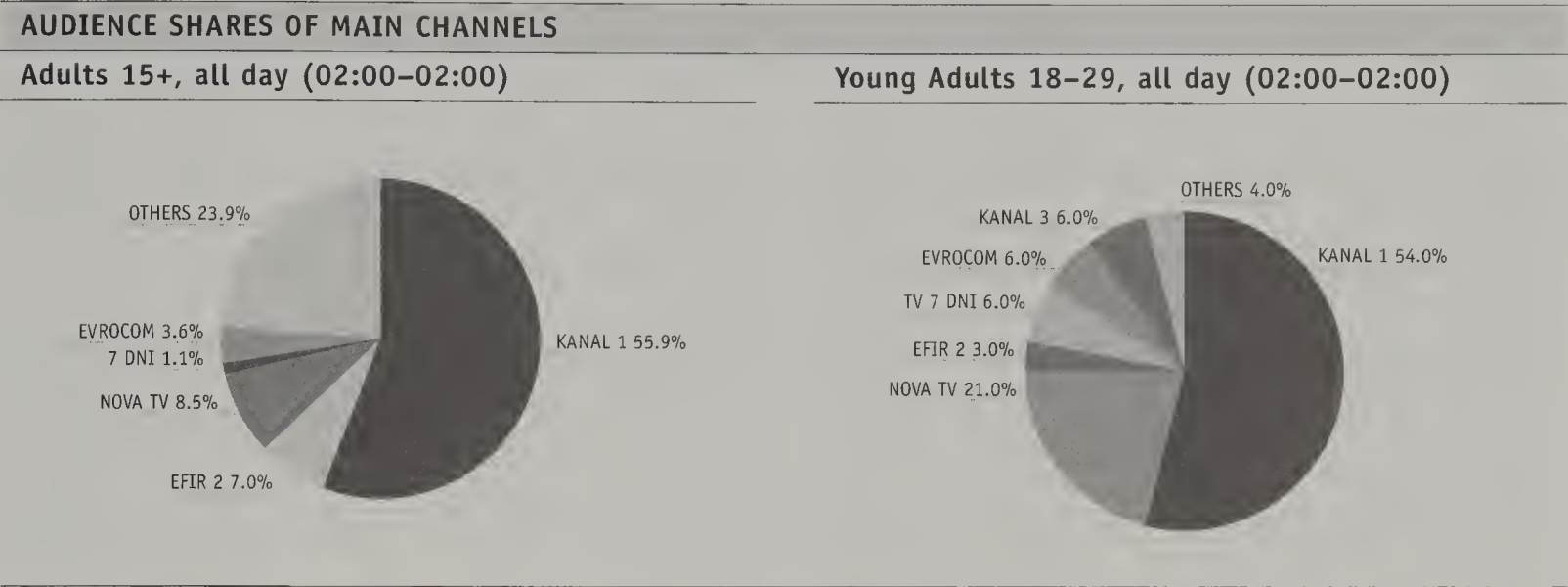
Source: NOEMA LTD.



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)									
	Adults 15+			Young Adults 18–29			Main Purchase Responsibles		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	83%	84%	82%	74%	76%	71%	86%	88%	84%
Viewing time per Viewer	169	219	192	234	178	175	183	211	204
Viewing time per Individual	180	184	179	178	167	164	173	186	192

Sources: NOEMA LTD.

Audience Shares



Source: NOEMA LTD.

AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00						
	Adults 15+		Young Adults 18–29		Main Purchase Responsibles	
	1998	1999	1998	1999	1998	1999
KANAL 1	49.2%	55.9%	45.9%	53.0%	n.a.	56.5%
EFIR 2	9.6%	7.0%	10.5%	7.0%	n.a.	7.8%
NOVA TV	7.6%	8.5%	12.2%	11.0%	n.a.	9.7%
7 DNI	1.8%	1.1%	0.7%	1.2%	n.a.	1.3%
EVROCOM	n.a.	3.6%	n.a.	4.3%	n.a.	4.3%
OTHER	31.8%	23.9%	34.1%	23.5%	n.a.	20.4%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS						
	Adults 15+		Young Adults 18–29		Main Purchase Responsibles	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	7–20 h	20–23 h	7–20 h	20–23 h	7–20 h	20–23 h
KANAL 1	57.2%	58.4%	54.3%	55.3%	59.2%	58.6%
EFIR 2	5.2%	7.4%	6.5%	7.3%	7.2%	7.6%
NOVA TV	6.6%	8.9%	7.6%	12.0%	7.6%	9.6%
7 DNI	1.2%	0.9%	0.8%	1.4%	0.6%	1.5%
EVROCOM	3.3%	3.5%	4.5%	3.8%	4.0%	4.5%
OTHER	26.5%	20.9%	26.3%	20.2%	21.4%	18.2%

Source: NOEMA LTD.

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
PO SVETA I U NAS	Bulgaria	Kanal 1	News	20:00	25/03	52.3%	85.3%
SPORT	Bulgaria	Kanal 1	Sport-News	20:25	04/04	51.5%	86.2%
PANORAMA	Bulgaria	Kanal 1	Magazin	20:30	03/04	50.8%	81.4%
EVERYBODY LOVES RAIMOND	USA	Kanal 1	Series-Family	21:15	07/12	48.1%	88.1%
ROBIN HOOD	USA	Kanal 1	Movie	20:25	11/04	46.4%	77.3%
NIGHT FALLS ON MANHATTAN	USA	Kanal 1	Movie	20:30	24/04	44.0%	90.1%
X- FILES	USA	Kanal 1	Series-Mysterious	20:30	06/02	41.8%	69.6%
LA PIOVRA 8	Italy	Kanal 1	Series-Crime	20:30	18/03	40.2%	80.9%
DOCTOR QUEEN	USA	Kanal 1	Series-Family	20:30	01/12	38.8%	64.6%
MRS. DOUBTFIRE	USA	Kanal 1	Movie	20:30	23/05	38.0%	63.2%
DUSTY ROAD OF THE DEATH	UK	Kanal 1	Movie	20:30	11/12	36.6%	61.1%
GODS MUST BE MAD	USA/Botsw.	Kanal 1	Movie	20:25	17/01	34.7%	54.8%
FBAL BULGARIA-ENGLAND		Kanal 1	Sport	19:20	09/06	32.8%	55.1%
FBAL LEVSKI 1914-JUVENTUS		Kanal 1	Sport	20:40	21/10	31.1%	44.5%
FOUR WEDDINGS AND A FUNERAL	UK	Kanal 1	Movie	20:30	12/04	28.2%	45.5%
MOMCHETO SI OTIVA	Bulgaria	Kanal 1	Movie	20:30	05/04	27.2%	49.6%
CRIMSON COLOUR	USA	Kanal 1	Movie	21:30	29/10	26.4%	48.1%
FBAL CSKA-LEVSKI 1914		Kanal 1	Sport	17:15	30/10	20.6%	82.4%
SESONAT NA KANARCHETATA	Bulgaria	Kanal 1	Movie	20:30	18/10	20.3%	36.8%
DVOYNICAT	Bulgaria	Kanal 1	Movie	20:30	28/06	20.2%	31.2%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
ROBIN HOOD	USA	Kanal 1	20:25	11/04	46.4%	77.3%
NIGHT FALLS ON MANHATTAN	USA	Kanal 1	20:30	24/04	44.0%	86.4%
MRS. DOUBTFIRE	USA	Kanal 1	20:30	23/05	38.0%	63.2%
DUSTY ROAD OF THE DEATH	UK	Kanal 1	20:30	11/12	36.6%	61.1%
GODS MUST BE MAD	USA/Botsw.	Kanal 1	20:25	17/01	34.7%	54.8%
FOUR WEDDINGS AND A FUNERAL	UK	Kanal 1	20:30	12/04	28.2%	45.5%
THE BOY IS GOING AWAY	Bulgaria	Kanal 1	20:30	05/04	27.2%	49.6%
CRIMSON COLOUR	USA	Kanal 1	21:30	29/10	26.4%	48.1%
CANARIES' SEASON	Bulgaria	Kanal 1	20:30	18/10	20.3%	36.8%
THE WARITH	Bulgaria	Kanal 1	20:30	28/06	20.2%	31.2%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL BULGARIA-ENGLAND		Kanal 1	19:20	09/06	32.8%	55.1%
FBAL LEVSKI 1914-JUVENTUS		Kanal 1	20:40	21/10	31.1%	44.5%
FBAL CSKA-LEVSKI 1914		Kanal 1	17:15	30/10	20.6%	82.4%
FBAL MAN. UNITED-INTER		Kanal 1	21:30	03/03	20.0%	40.6%
FBAL OLIMPIQE MARS.-PARMA		Kanal 1	20:55	12/05	19.9%	35.6%
FBAL MAN. UNITED-BAYERN		Kanal 1	21:30	26/05	19.6%	39.0%
FBAL POLAND-BULGARIA		Kanal 1	21:25	04/06	18.2%	37.1%
FBAL BULGARIA-LUXEMBURG		Kanal 1	17:50	10/10	17.5%	54.7%
FBAL GREECE -BULGARIA		Kanal 1	15:25	14/11	17.3%	57.4%
FBAL CHELSEA-MILAN		Kanal 1	21:30	15/09	17.5%	35.8%

Source: NOEMA LTD.

Top Programmes Channel by Channel

KANAL 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
AROUND THE WORLD	Bulgaria	News	365	20:00	25	45.6%	73.2%
SPORT	Bulgaria	News	323	20:25	5	40.2%	61.6%
PANORAMA	Bulgaria	Magazine	75	20:30	60	38.5%	45.0%
EVERYBODY LOVES RAIMOND	USA	Series–Family	8	21:15	25	34.6%	35.8%
X–FILES	USA	Series–Myster.	71	20:30	45	33.8%	52.6%
LA PIOVRA 8	Italy	Series–Crime	4	20:30	55	32.5%	50.6%
DANUBE BRIDGE	Bulgaria	Series	7	20:30	60	30.2%	51.3%
DOCTOR QUEEN	USA	Series–Family	11	20:30	45	28.8%	56.9%
MONDAY 8 1/2	Bulgaria	Magaz.–Cinema	50	20:30	120	17.2%	35.5%
CHAMPION’S LEAGUE	n.a.	Sport	30	21:30	40	10.8%	25.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ROBIN HOOD	USA	Movie	11/04	20:25	125	46.4%	77.3%
NIGHT FALLS ON MANHATTAN	USA	Movie	24/04	20:30	125	44.0%	86.4%
MRS. DOUBTFIRE	USA	Movie	23/05	20:30	125	38.0%	63.2%
DUSTY ROAD OF DEATH	UK	Movie	11/12	20:30	115	36.6%	61.1%
GODS MUST BE MAD	USA/Botsw.	Movie	17/01	20:25	95	34.7%	54.8%
FBAL BULGARIA–UK	Bulgaria	Sport	09/06	19:20	120	32.8%	55.1%
FBAL LEVSKI 1914–JUVENTUS	Bulgaria	Sport	21/10	20:40	120	31.1%	44.5%
FOUR WEDDINGS AND A FUNERAL	UK	Movie	12/04	20:30	115	28.2%	45.5%
THE BOY IS GOING AWAY	Bulgaria	Movie	05/04	20:30	90	27.2%	49.6%
CRIMSON COLOUR	USA	Movie	29/10	21:30	150	26.4%	48.1%

Source: NOEMA LTD.

EFIR 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
SCOTISH FIGHTER	Canada	Series	44	19:40	50	17.3%	45.2%
ABSOLUTE SAFETY	USA	Series–Crime	13	19:40	50	16.8%	45.4%
MURDER DEPARTMENT	France	Series–Crime	33	19:25	50	16.5%	41.8%
RISK PECHELI, RISK GUBI	Bulgaria	Game Show	235	18:30	30	16.4%	56.2%
FOOTBALL +		Sport	10	22:15	120	13.7%	38.6%
AROUND THE WORLD	Bulgaria	News	365	22:00	10	12.8%	38.7%
TOP SPORT	Bulgaria	News	365	22:10	5	12.8%	37.4%
CHAMPION’S LEAGUE		Sport	10	21:30	120	12.5%	19.2%
CAPTAIN PETKO	Bulgaria	Series	12	19:05	80	11.2%	43.5%
NBA	USA	Sport	30	22:15	60	5.8%	16.3%

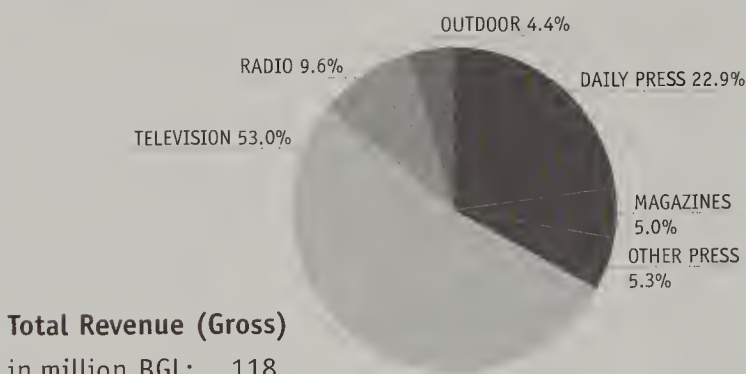
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL OLYMPIC MARS–MANCHESTER		Sport	19/01	21:30	120	16.4%	22.1%
FBAL HAIDUK–LEVSKI 1994		Sport	16/09	18:45	115	13.0%	39.6%
FBAL LITEX–GLENTORAN		Sport	14/07	18:25	120	11.4%	39.3%
FBAL LEVSKI–SLAVIA		Sport	07/11	16:45	130	8.0%	48.5%
FBAL CSKA–LITEX		Sport	22/05	17:45	135	7.6%	45.8%
FBAL JUGOSLAVIA–CROATIA		Sport	27/03	21:00	120	6.8%	12.5%
RED HEAT	USA	Movie	03/02	22:20	125	6.2%	23.1%
BASIC INSTICT	USA	Movie	08/03	22:20	125	6.0%	21.2%
INFERNO BEHIND BARS	USA	Movie	09/11	22:30	120	5.4%	18.0%
THE GRADUATE	USA	Movie	10/10	22:30	90	5.2%	17.5%

Source: NOEMA LTD.

Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million BGL)	118
Total adspend (in million USD)	67
Total adspend (in million EUR)	66
TV adspend (in million BGL)	63
TV adspend (in million USD)	35
TV adspend (in million EUR)	35
TV adspend in % of GDP	0.28
TV adspend per capita (USD)	4.3

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



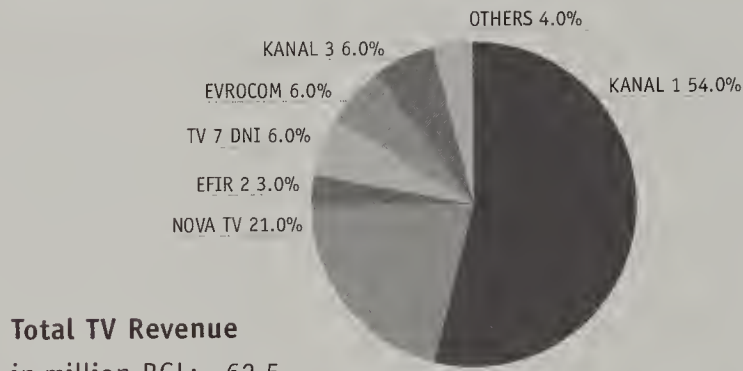
Total Revenue (Gross)
in million BGL: 118
in million EUR: 66

Source: NOEMA LTD.

TV ADVERTISING STATISTICS	
Total number of spots broadcast	176 404
Average spot length (in sec.)	30
Total number of advertisers	n.a.
Number of TV advertisers	1 550
Total number of advertised products	n.a.
Number products advertised on TV	2 100

Source: NOEMA LTD.

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue
in million BGL: 62.5
in million EUR: 34.9

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	4 Media*	Television	Spent in TV	Share of TV Expenditure
DETERGENTS	8.5	8.5	100%	13.6%
BEER	7.0	6.5	94%	10.4%
COSMETICS	4.4	4.3	98%	6.8%
CONFECTIONARY	4.1	3.6	88%	5.8%
COCA-COLA	2.2	2.0	90%	3.1%
COUNTLINES	1.8	1.3	75%	2.1%
TELECOMMUNICATIONS	4.0	1.0	26%	1.6%
TOILET PAPER	6.4	0.6	100%	1.0%
FARMACEUTICALS	5.6	0.6	98%	0.9%
INSURANCES	5.4	0.5	100%	0.8%
OTHER	84.1	33.6	40%	46.2%
TV Advertisers				
PROCTER & GAMBLE	6.5	6.5	100%	14.2%
INTERBREW	3.1	3.0	95%	6.5%
UNILEAVER	2.9	2.9	100%	6.3%
BREWINVEST	2.9	2.7	94%	6.0%
COCA-COLA COMPANY	2.2	2.0	90%	4.3%
KRAFT JACOBS SUCHARD	2.3	1.8	79%	4.0%
WRIGLEY'S	1.8	1.8	100%	3.9%
BEIERSDORF	1.2	1.2	100%	2.7%
NESTLE	1.4	0.9	67%	2.0%
BELANA	0.6	0.6	100%	1.4%
OTHER	25.0	23.5	94%	48.7%
Total (in million BGL)	117.7	62.5	53%	100%
Total (in million EUR)	65.8	34.9	53%	100%

Source: Aconnect

*Press, TV, radio and outdoor

Despite of many political changes that took place since last year, the television situation in Croatia is more or less the same. In Croatia we still have three national TV channels belonging to Croatian Radio Television (HRT). HRT is national public television in state ownership which is also financed from TV and radio subscriptions and from advertising. It now has coverage of 97.5% of Croatian population. At this moment, a new law is being considered for HRT. It is very likely that the third HRT channel will be privatised.

HRT 1 began broadcasting in 1956 and is now predominantly oriented on news, politics, educational and documentary programmes, as well as domestic movies and drama programmes. HRT 2 also began emitting in 1956 and has become an entertainment channel (foreign movies, serials, comedy shows), as well as broadcasting regional programmes and news. HRT 3 is the youngest of the three and began in 1994; it is dedicated to sports and music.

In the last few years, private local TV channels have slowly but surely been appearing. Nowadays, there are 12 local TV channels in Croatia: Open TV, TV Varaždin, TV Vinkovci, TV Moslavina, TV Čakovec, TV Slavonije i Baranje, Independent Istrian TV, TV Nova, TV Zadar, TV Šibenik, Adriatic TV and NOVA TV (one more than last year).

News in this year (2000) is Croatian Commercial Network. Their shows are transmitted by optical fibre and emitted on 8 local TV channels.

In 1999, there were approx. 80 channels in Croatia, from which number about one half were by cable and satellite. Croatian TV had an average share of 94.5% in 1999 and all other channels had 5.5% average share. (Source: GfK-Centre for Market Research.) Competition between HRT and local TV channels does not, as such, really exist. The situation is rather different to that of most other European countries.

TV audience measurement is in its first developmental stage. From independent research agencies, only GfK-Centre for Market Research (TV panel) measures TV audience. They have been conducting research in Croatia since January 1998 on a regular basis (by diary method), but still only one week per month. Most of the clients are advertising agencies. There are still small or minimal chances for introducing new technology in TV audience measurement, i.e. peoplemeter system, in Croatia in next year.

Total advertising expenditure in 1999 was lower than in 1998. (estimation of Media net: 293 000 000 DEM). More than half the total advertising expenditure, i.e. 56%, was spent on television.

Croatia

General Data:	280
TV Landscape:	281
Viewing Patterns:	282
Audience Shares:	283
Top Programmes all Channels:	284
Top Programmes Channel by Channel:	285
Advertising Expenditure:	287

General Data

COUNTRY	
Land area (km²)	56 538
Total population	4 676 865
Number of households	1 700 409*
Average household size	2.8
In % of households equipped	
Phone	94.5
Mobile telephone subscribers	30.9
PC's	24.5
Internet access	n.a.
Internet users**	2.1

Source: HRT *in 1998 (UN/ECE Statistical Division), ** Base: population 0+; Nua est.

ECONOMICS	
GDP in million HRK (at current prices)	138 717
GDP per capita in HRK (at current prices)	30 156
Inflation rate in 1999 (in %)	4.2
Value of HRK in Euro (EUR)	1 EUR = 7.63 HRK
Value of HRK in US-Dollar (USD)	1 USD = 7.12 HRK

Source: Ministry of Foreign Affairs

TV OVERVIEW	
Total number of TV households (TVHH)	1 676 603
In % of all households	98.6
Numbers of channels received by 70% of the population	3
TV License-Fee cost per year	HRK 540.-/EUR 70.80

TV EQUIPMENT	
	in % of TVHH
Colour TV	97.4
Multiset (homes with more than 1 TV set)	33.4
VCR	66.2
Teletext	61.3
Remote control	n.a.

Source: HRT UN/ECE Statistical Division

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	12.5*
Satellite	private dish/DTH	30.4
	collective dish/SMATV	18.2
Terrestrial	analog	97.5
	digital	n.a.
	MMDS	n.a.

*SES Astra

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
HTV 1	1956	T, S	97%	Croatian	168	Generalist	L-F, Adv.	In-house
HTV 2	1956	T, S	97%	Croatian	168	Generalist	L-F, Adv.	In-house
HTV 3	1994	T, S	95%	Croatian	168	Generalist	L-F, Adv.	In-house
HRT NACIONAL	1999	S	n.a.	Croatian	42	Generalist	L-F, Adv.	In-house

Source: HRT

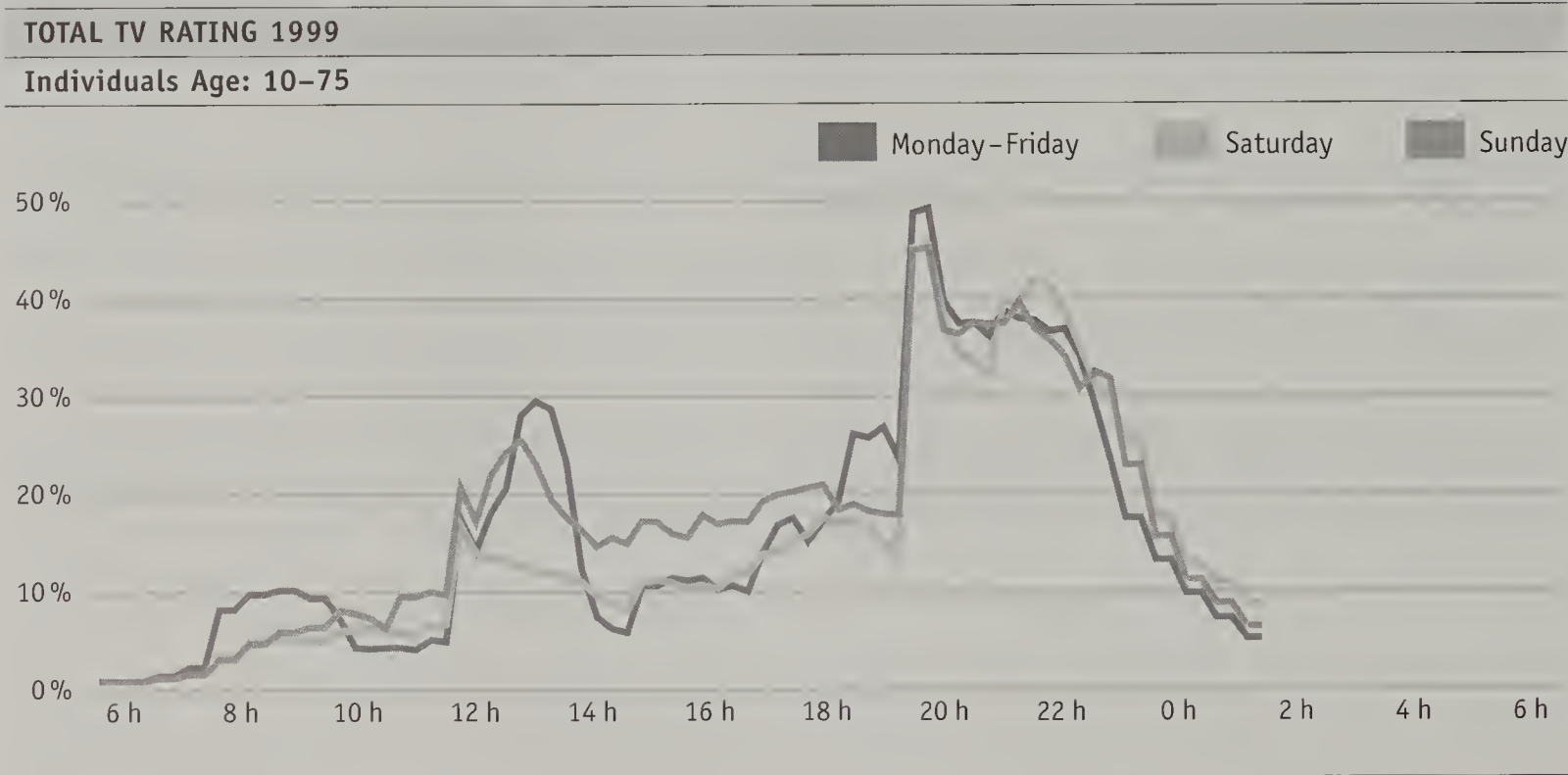
DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
OTV ZAGREB	1998	T	n.a.	Croatian	112	Generalist	Adv.	In-house
STV OSIJEK	1992	T	12.8%	Croatian	168	Generalist	Adv.	In-house
ATV SPLIT	1996	T	7.5%	Croatian	112	Generalist	Adv.	In-house
VTV VARAZDIN	1998	T, C	6%	Croatian	49	Generalist	Adv.	In-house
NIT PAZIN	1998	T	6%	Croatian	49	Generalist	Adv.	In-house
RI TV RIJEKA	1998	T	10%	Croatian	42	Generalist	Adv.	In-house
TV NOVA PULA	1996	T	4%	Croatian/Italian	56	Generalist	Adv.	In-house
CAKOVECKA TV	1996	T	8%	Croatian	56	Generalist	Adv.	In-house
TV MOSLAVINA	1995	T	4%	Croat	63	Generalist	Adv.	In-house
GRADSKA TV ZADAR	1992	T	3%	Croatian	168	Generalist	Adv.	In-house
VINKOVACKA TV	1994	T	n.a.	Croatian	53	Generalist	Adv.	In-house
KANAL RI RIJEKA	1999	T, C	3%	Croatian/Italian	46	Generalist	Adv.	In-house

Source: Channels

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	GfK–Centre for Market Research
Panel/Sampling Size	Minimum 1 000 respondents
Instrument used (people-meter, telefon, face-to-face)	diary/panel
	Population size in 000
Individuals 10–75	3 973
Adults 18–75	3 389
Children 10–14	331

Sources: GfK – Centre for Market Research



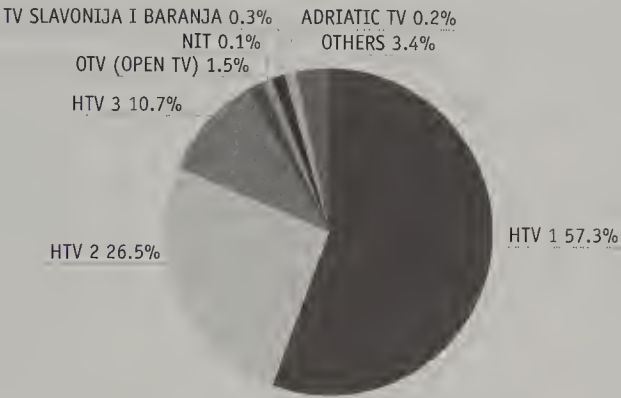
DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)									
	Individuals 10–75			Adults 18–75			Children 10–14		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	n.a.	n.a.	82.1	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Viewing time per Viewer	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Viewing time per Individual	n.a.	n.a.	214	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Source: GfK – Centre for Market Research

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS

Adults 10–75, all day (7:00–1:30)



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 07:00 – 01:30		
	Individuals 10–75	
	1998	1999
HTV 1	53.5%	57.3%
HTV 2	28.1%	26.5%
HTV 3	12.7%	10.7%
OTV (OPEN TV)	1.9%	1.5%
NIT	n.a.	0.1%
TV SLAVONIJA I BARANJA	n.a.	0.3%
ADRIATIC TV	n.a.	0.2%
OTHERS	3.8%	3.4%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS		
	Individuals 10–75	
	Day Time 7–19:15 h	Prime Time 19:15–23 h
HTV 1	61.3%	55.4%
HTV 2	21.2%	30.3%
HTV 3	11.2%	10.4%
OTV (OPEN TV)	0.6%	0.6%
NIT	0.0%	0.1%
TV SLAVONIJA I BARANJA	0.1%	0.4%
ADRIATIC TV	0.1%	0.2%
OTHERS	5.5%	2.6%

Sources: GfK–Centre for Market Research

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)						
Title	Land	Channel	Genre	Start.Time	Date	Audience
PRESIDENT TUDJMAN'S FUNERAL	Croatia	HTV 1	Docum.	14:00	13/12	76.3%
FBAL CROATIA-JUGOSLAVIA		HTV 3	Sport	19:25	09/10	69.8%
NEWS	Croatia	HTV 1	News	19:30	13/12	61.6%
KOSOVO CRISES	Croatia	HTV 1	Magazine	20:20	24/03	56.6%
FBAL JUGOSLAVIA-CROATIA		HTV 3	Sport	20:25	18/08	54.6%
GRAND PRIX EUROV. DE LA CH. 99		HTV 1	Variety Show	21:00	29/05	54.4%
MISS WORLD	UK	HTV 2	Variety Show	21:25	04/12	53.0%
DORA 99	Croatia	HTV 1	Music	20:20	07/03	52.4%
FUNERAL PROC./PRES. TUDJMAN	Croatia	HTV 1	Docum.	14:00	13/12	49.5%
FBAL CROATIA-REP.OF IRELAND		HTV 3	Sport	20:20	04/09	46.7%
HIGH MASS/PRES. TUDJMAN	Croatia	HTV 1	Docum.	17:55	13/12	46.4%
FBAL CL MANCH. UNITED-CROATIA		HTV 3	Sport	20:40	14/09	44.6%
HOLLYWOOD SQUARES	Croatia	HTV 1	Game Show	21:20	05/12	44.3%
NEWS	Croatia	HTV 1	News	12:00	11/12	44.2%
CETVERORED	Croatia	HTV 1	Series-General	20:20	26/12	43.9%
FBAL CL CROATIA-MANCH. UNITED		HTV 3	Sport	20:40	27/10	43.8%
VELO MISTO	Croatia	HTV 1	Series-Family	20:15	17/07	43.4%
FBAL CL STURM-CROATIA		HTV 3	Sport	20:40	19/10	43.2%
TAKE THE MONEY AND RUN	Croatia	HTV 2	Game Show	20:05	14/12	42.3%
FBAL CL CROATIA-STURM		HTV 3	Sport	20:40	29/09	40.9%

Source: HRT Barometer

TOP 10 MOVIES					
Title	Land	Channel	Start. Time	Date	Audience
THE GREATEST STORY EVER TOLD	USA	HTV 1	20:40	25/12	40.7%
DUMB AND DUMBER	USA	HTV 1	20:10	01/01	39.2%
GOSPA	Croatia	HTV 2	20:15	13/12	38.8%
PRESIDIO	USA	HTV 2	20:30	18/12	38.8%
ON DEADLY GROUND	USA	HTV 1	20:10	20/11	37.5%
COMING TO AMERICA	USA	HTV 1	20:10	04/12	35.9%
MIRACLE ON 34TH STREET	USA	HTV 2	20:45	24/12	34.3%
THE FABULOUS BAKER BOYS	USA	HTV 1	20:10	27/11	34.1%
DISCLOSURE	USA	HTV 1	20:30	02/10	33.7%
THE GROUNDHOG DAY	USA	HTV 1	20:05	09/01	32.9%

Source: HRT Barometar

TOP 10 SPORT EVENTS				
Title	Channel	Start. Time	Date	Audience
FBAL CROATIA-JUGOSLAVIA	HTV 3	19:25	09/10	69.8%
FBAL JUGOSLAVIA-CROATIA	HTV 3	20:25	18/08	54.6%
FBAL CROATIA-REP. IRELAND	HTV 3	20:20	04/09	46.7%
FBAL CL MANCHESTER UNITED-CROATIA	HTV 3	20:40	14/09	44.6%
FBAL CL CROATIA-MANCHESTER UNITED	HTV 3	20:40	27/10	43.8%
FBAL CL STURM-CROATIA	HTV 3	20:40	19/10	43.2%
FBAL CL CROATIA-STURM	HTV 3	20:40	29/09	40.9%
FBAL CL OLIMPIQUE-CROATIA	HTV 3	20:40	02/11	40.5%
FBAL CL CROATIA-OLIMPIQUE	HTV 3	20:40	22/09	38.7%
FBAL CL MTK-CROATIA	HTV 3	20:10	25/08	38.0%

Source: HRT Barometar

Top Programmes Channel by Channel

HTV 1						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
NEWS III	Croatia	News	365	19:30	30	46.1%
VELO MISTO	Croatia	Series-General	14	20:10	65	41.1%
TRECA SRECA	Croatia	Game Show	8	21:05	90	34.4%
SUNCE	Croatia	Variety Show	20	20:10	90	31.4%
NASA KUCICA NASA SLOBODICA	Croatia	Series-Family	12	20:10	30	34.6%
ZLATNA RIBICA	Croatia	Reality Show	12	20:15	60	28.7%
SATURDAY FILM	n.a.	Movie	n.a.	20:45	n.a.	28.2%
ZIVA ISTINA	Croatia	Reality Show	27	20:10	30	27.1%
ESMERALDA	Mexico	Ser.-Daily Soap	83	13:05	45	25.7%
LA USURPADORA	Mexico	Ser.-Daily Soap	102	13:25	45	27.7%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
PRESIDENT TUDJMAN'S FUNERAL	Croatia	Documentary	13/12	14:00	235	76.3%
KOSOVO CRISES	Croatia	Magazin	24/03	20:20	100	56.6%
GRAND PRIX EUROV. DE LA CH. 99		Variety Show	29/05	21:00	185	54.4%
DORA '99	Croatia	Music	07/03	20:20	230	52.4%
FUNERAL PROC./PRES. TUDJMAN	Croatia	Documentary	11/12	14:00	330	49.5%
HIGH MASS/PRES. TUDJMAN	Croatia	Documentary	13/12	17:55	95	46.4%
CETVERORED	Croatia	Series-General	26/12	20:20	115	43.9%
LET'S SING DORA	Croatia	Music	06/03	20:20	150	40.8%
THE GREATEST STORY EVER TOLD	USA	Movie	25/12	20:40	170	40.7%
PORIN '99	Croatia	Variety Show	02/05	20:10	210	36.5%

Source: HRT Barometar

HTV 2						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
TAKE THE MONEY AND RUN	Croatia	Game Show	257	20:00	12	29.4%
E.R.	USA	Series	31	21:15	45	26.4%
CHICAGO HOPE	USA	Series	21	21:10	45	24.7%
FRIENDS	USA	Sitcom	67	21:10	25	29.5%
MURPHY BROWN	USA	Sitcom	22	21:20	25	22.2%
X-FILES	USA	Series-Mystery	28	21:00	45	26.7%
THE TOMMYKNOCKERS	USA	Series-Mystery	4	20:30	45	23.4%
ROSEANNE	USA	Sitcom	24	20:30	25	25.3%
VERONIKA'S CLOSET	USA	Sitcom	22	21:10	25	22.8%
SEINFELD	USA	Sitcom	33	20:30	25	25.2%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience
MISS WORLD	UK	Variety Show	04/12	21:25	140	52.4%
FUNERAL PROC./PRES. TUDJMAN	Croatia	Documentary	11/12	14:00	330	49.5%
MOONCLIPS	Croatia	Documentary	11/08	12:30	65	39.2%
GOSPA	Croatia	Movie	13/12	20:15	120	38.8%
MIRACLE ON 34TH STREET	USA	Movie	24/12	20:45	110	34.3%
FUNERAL PROC./PRES. TUDJMAN	Croatia	Documentary	12/12	20:15	80	31.7%
HOME ALONE 2	USA	Movie	24/12	17:00	115	28.2%
MELODIES OF CROATIAN ADRIATIC	Croatia	Music	03/07	21:15	120	27.7%
BATMAN FOREVER	USA	Movie	29/12	22:45	110	25.9%
UNIVERSAL SOLDIER	USA	Movie	19/09	21:05	100	24.9%

Source: HRT Barometar

HTV 3						
Top 8 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
FBAL	USA/France	Sport	33	15:30	105	32.2%
FBAL CL		Sport	35	20:40	105	32.0%
MONDAY NIGHT MOVIE		Movie	6	21.35	n.a.	22.4%
FBAL	Croatia	Sport	41	n.a.	120	21.9%
OPRAH SHOW	USA	Talk Show	18	16.40	45	21.7%
FBAL	Croatia	Sport	14	20:00	110	19.0%
PETICA		Sport Magazine	31	20:15	60	18.4%
HBAL EU LEAGUE		Sport	6	n.a.	85	17.8%

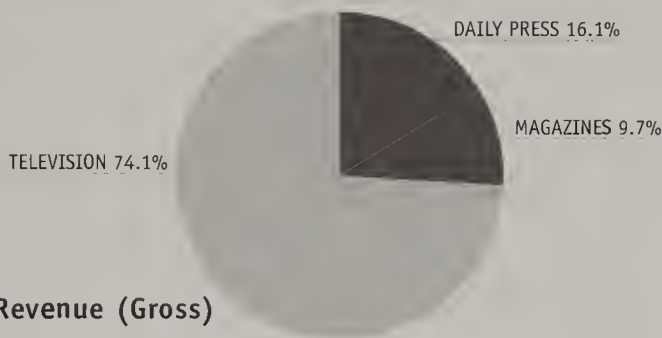
Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience
FBAL CROATIA-JUGOSLAVIA	Sport	09/10	19:25	110	69.8%
FBAL JUGOSLAVIA-CROATIA	Sport	18/08	20:25	110	54.6%
FBAL CROATIA-REPUBLIC OF IRELAND	Sport	04/09	20:20	110	46.7%
FBAL MANCHESTER UNITED-CROATIA	Sport	14/09	20:40	110	44.6%
FBAL CROATIA-MANCHESTER UNITED	Sport	27/10	20:40	110	43.8%
FBAL CL STURM-CROATIA	Sport	19/10	20:40	110	43.2%
FBAL CL CROATIA-STURM	Sport	29/09	20:40	110	40.9%
FBAL CL OLIMPIQUE-CROATIA	Sport	02/11	20:40	110	40.5%
FBAL CL CROATIA-OLIMPIQUE	Sport	22/09	20:40	110	38.7%
FBAL CL MTK-CROATIA	Sport	25/08	20:10	110	38.0%

Sources: HRT Barometar

Advertising Expenditure

ADVERTISING FIGURES	GROSS	NET
Total adspend (in million HRK)	963.7	789.9
Total adspend (in million USD)	135.5	111.1
Total adspend (in million EUR)	126.3	103.5
TV adspend (in million HRK)	714.2	585.4
TV adspend (in million USD)	100.5	82.3
TV adspend (in million EUR)	93.6	76.6
TV adspend in % of HRK	0.5	0.4
TV adspend per capita (USD)	22.1	18.1

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue (Gross)

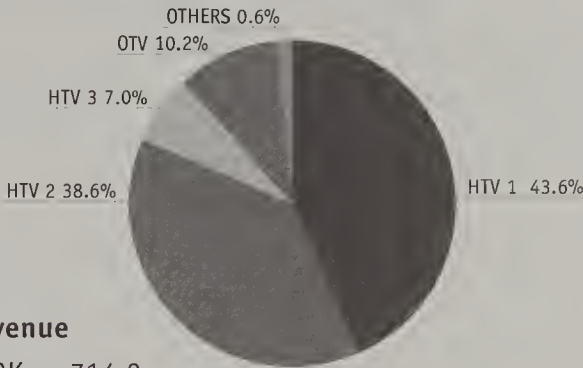
in million HRK: 963.7
in million EUR: 126.3

Source: AC Nielsen

TV ADVERTISING STATISTICS	
Total number of spots broadcast	97 438
Average spot length (in sec.)	21.7 ¹
Total number of advertisers	n.a.
Number of TV advertisers	609 ¹
Total number of advertised products	4 827 ²
Number products advertised on TV	2 270 ²

Source: AC Nielsen Croatia
¹HRT only, ²All brand name services/campaigns/product variants were counted

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



Total TV Revenue

in million HRK: 714.2
in million EUR: 593.6

TOP 10 ADVERTISING FIGURES	NET			
TV Advertising Sectors	2 Media*	Television	Spent in TV	Share of TV Expenditure
BEER	37.4	33.4	89.4%	5.7%
TELECOMMUNICATION SERVICES	32	25.8	80.7%	4.4%
MAGAZINES AND NEWSPAPERS	25.5	22.2	87.4%	3.8%
CARS (PERSONAL USE)	55	17.6	32.0%	3.0%
BANKS AND CREDIT CARDS	35	16.4	46.8%	2.8%
LAUNDRY DETERGENTS	16.7	16.4	98.2%	2.8%
CHEWING GUM	16.4	16.4	99.7%	2.8%
CHOCOLATE	16.2	15.8	97.8%	2.7%
CARBONATED SOFT DRINKS	15.9	15.2	95.5%	2.6%
DEPARTMENT STORES/RETAIL CHAINS	15.6	5.9	32.7%	1.0%
OTHER	530.3	401	75.6%	68.5%
TV Advertisers				
PROCTER & GAMBLE	46.6	45.7	98.0%	7.8%
COCA COLA COMPANY	18.3	17.6	96.2%	3.0%
UNILEVER	18.6	17.6	94.6%	3.0%
ZAGREBACKA PIVOVARA	18.6	17.6	94.5%	3.0%
WRIGLEY	15.2	15.2	100.0%	2.6%
HRVATSKE TELEKOMUNIKACIJE	17.8	14.1	79.4%	2.4%
HRVATSKA LUTRIJA	15.8	13.5	85.3%	2.3%
PLIVA	14.2	12.9	90.9%	2.2%
VIP NET	12.5	10	80.0%	1.7%
ZAGREBACKA BANKA	6.4	5.9	49.1%	1.0%
OTHERS	601.4	416.2	69.2%	71.1%
Total (in million HRK)	789.9	585.4	74.1%	100.0%
Total (in million EUR)	103.5	76.7	74.1%	100.0%

Source: HRT Marketing, * Press and TV

NOTE: Campaigns/appeals/public&social concern are not included, and neither is Telemarketing

Czech Republic

1999 began with direct disputes between the owner of TV Nova's broadcasting licence (CET 21 – V. Zelezny) and a service organization (CNTS, filial company CME). This conflict came to a head in August, and resulted in the split of these companies. The crisis was reflected in the quality of broadcasting and changes in viewer behaviour. During this time, the selling of autumn advertising campaigns had been affected by the confusion. The split of the companies and the initial lack of clarity in the new service company caused the TV market leader to be absent from the peplemeters measurement. During the period from August to December 1999, data about the viewing of certain programmes was not available, and agencies had to work with the more limited daily minute profiles. The data concerning advertisements was also unavailable. This meant that TV Nova could not fulfil its agreement obligations concerning set policy for the sale of advertising space. Due to this, TV Nova started to sell according to a block rate-card, depending on its own estimation of block ratings.

All other TV stations profited from this situation. TV Prima, the other commercial channel, claimed a significant growth of audience share in August. Prima took advantage of the weakened position of TV Nova and came up with an appealing programme scheme. It also managed to attract some of TV Nova's viewers. Prima introduced popular serials, which had originally been broadcast on TV Nova and thus enticed away many regular viewers.

Public stations also joined the fight for viewers. Public Channel CT focused mainly on the improvement of the graphic design in broadcasting. The biggest changes were marked in jingles and self-promotion. The main point was to make broadcasting more lively, programme schemes clearer and to introduce modern design. As a result, the audience grew, mainly in young and middle aged viewers. The greatest increase in viewers was marked in the target group of ages 25–34.

The lack of free broadcasting frequencies greatly limits the ability of new commercial stations to enter the market. TV Galaxie (the strongest regional station so far) came up with the project of connecting regional stations into a net, and creating the third „national“ commercial station. The project was successfully launched on 25th May 2000. The net entered the market as „TV 3“, and the initial coverage is 23% of population.

Viewers have been more interested in domestic rather than foreign productions over the last few years, and year 1999 confirmed this trend. The tops of programmes were mostly occupied by entertainment formats and serials. There have been almost no new formats among the programme genres there. Programmes are considered successful if they manage to address as wide a population as possible, and reach the highest viewing figures in the group of Adults 15+ . This programming leads to displace formats focused on narrow target groups.

Changes in TV Nova and the new TV station entering the market showed the weak points of the contemporary measuring system, which requires the narrow cooperation of all the TV stations. ATO, responsible for peoplemeter measurement began negotiations about the new subjects entering the peoplemeter project, and the way of measuring the new TV stations, for example TV3.

In 1999, the advertising market was influenced by two significant factors: positive news about economic development and changes on the TV scene mentioned above.

Advertisers profited from raising demand for their products and from the possibility of making their target price. Growing consumption led to the revival of the advertising market, showing a year by year increase (98/99) estimated at 2.8%. This factor, along with a very low inflation rate, caused a dynamic increase in advertising investments. The market for compulsory car insurance was liberalized, and insurance companies concentrated their efforts concerning commercial communication at the end of the year.

In order to introduce a different TV presentation, advertisers replaced the traditional 30 seconds spots with other formats. In 1999, short, mainly 20 second spots appeared in great number. Another new trend is a two-part commercial: at the beginning of the block there is a spot promoting a brand and at the end a 5 second reminder summarizing the central message and reminding the viewer of the brand. So called tandem spots are appearing - with two different brands being presented in one spot. IP Praha has introduced a new format – Split Screen. The screen is divided between two clients, enabling two different commercials to run at the same time.

In the year 2000, media, mainly TV, will face a big challenge. The Czech Republic is gradually joining the European structures, an action which requires changes in the Czech legislature. The most significant review will concern advertisement law and the operation of radio and TV broadcasting. These rules also set limits for the placement of commercials into a programme scheme, and limits for the amount of broadcasted commercials.

CzechRepublik

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General Data

COUNTRY	
Land area (km ²)	78 866
Total population	10 321 000
Number of households	3 822 000
Average household size	2.7
In % of households/population equipped	
Phone	76.6/80.2
Mobile telephone subscribers	22.1/23.5
PC's	16.5/17.1
Internet user	10.3*

* Base: 15–79 GfK Praha

ECONOMICS	
GDP in million CZK (at current prices)	1 870 000
GDP per capita in CZK (at current prices)	181 183
Inflation rate in 1999 (in %)	2.1
Value of CZK in Euro (EUR)	1 EUR = 36.10 CZK*
Value of CZK in US-Dollar (USD)	1 USD = 35.94 CZK*

Sources: Taylor Nelson Sofres-ATO; Czech statistic office

*December 1999

TV OVERVIEW	
Total number of TV households (TVHH)	3 782 000
In % of all households	98.9
Numbers of channels received by 70% of the population	4
TV License-Fee cost per year	CZK 900.–/EUR 24.90

TV EQUIPMENT	
	in % of TVHH
Colour TV	96.7
Multiset (homes with more than 1 TV set)	24.9
VCR	43.2
Teletext	45.4
Remote control	82.5

Source: Taylor Nelson Sofres-ATO

¹ Statistical Yearbook 2000 European Audiovisual Observatory

TV DISTRIBUTION			in % of TVHH
Cable	passed		62.3 ¹
	connected		22.1
Satellite	private dish/DTH		14.4
	collective dish/SMATV		n.a.
Terrestrial	analog		90.4
	digital		n.a.
	MMDS		n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	5.9%	Digital TV subscribers	0

Source: Taylor Nelson Sofres-ATO

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
CT 1	1953	T, C, S	100%	Czech	168	Generalist	L-F, Adv.	IP-Prague
CT 2	1970	T, C, S	98%	Czech	168	Generalist	L-F, Adv.	IP-Prague

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
NOVA	1994	T, C	99.8%	Czech	151	Generalist	Adv.	MAG MEDIA
PRIMA	1993	T, C, S	88.3%	Czech	130	Generalist	Adv.	Premedia

Sources: Taylor Nelson Sofres-ATO; IP-Prague

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diff.	Tech. Pen.	Language	h/week	Programming	Revenue	Sales House
GALAXIE	1997	T, C, S	17%	Czech	133	Generalist	Adv.	Galaxie TV
GENUS TV	1995	T	n.a.	Czech	n.a.	News	Adv.	Genus TV
POLAR-TELEV. OSTRAVA	1998	T	n.a.	Czech	n.a.	News	Adv.	Studio Cliper,*
PULS	1991	T	n.a.	Czech	n.a.	News	Adv.	Puls
TELEVIZE DAKR	1995	T	n.a.	Czech	n.a.	News	Adv.	Dakr s.r.o.
TELEVIZE FONKA	1997	T	n.a.	Czech	n.a.	News, Sport	Adv.	Videost. Fonka
TV GIMI	1995	T	n.a.	Czech	n.a.	News	Adv.	Gimi s.r.o.
TV LYRA	1997	T	n.a.	Czech	n.a.	Documentaries	Adv.	RTD s.r.o.
TV MORAVA	1994	T	n.a.	Czech	n.a.	Generalist	Adv.	Kabel plus**

Sources: Taylor Nelson Sofres-ATO; IP-Prague

*v.o.s., **Stední Morava

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
EUROSPORT	Private	C, S	22%	English/Czech/German	Sport	Adv.
CNN INTERNATIONAL	Private	C, S	9.8%	English	News	Adv.
MTV EUROPE	Private	C, S	11.4%	English	Music	Adv.
TNT	Private	C, S	6.8%	English	Old movies	Adv.
3 SAT	Public	C, S	7.7%	German	Generalist	L-F
CARTOON NETWORK	Private	S	9.4%	English	Cartoons	Adv.
EURONEWS	Private	C, S	8.2%	English	News	Adv.
SKY NEWS	Private	C, S	6.3%	English	News	Adv.

Sources: Taylor Nelson Sofres-ATO; IP-Prague

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
STV 1	Public	T, C	10%	Slovak	Generalist	L-F, Adv.
STV 2	Public	T, C	12.4%	Slovak	Generalist	L-F, Adv.
MARKIZA	Private	T, C	10.6%	Slovak	Generalist	Adv.
VTV	Private	C, S	9.2%	Slovak	Generalist	Adv.
ARD	Public	T, C, S	15.5%	German	Generalist	L-F, Adv.
BAYERN 3	Public	S	9.5%	German	Generalist	L-F, Adv.
ZDF	Public	T, C, S	16.0%	German	Generalist	L-F, Adv.
RTL 2	Private	T, C, S	17.3%	German	Generalist	Adv.
SAT 1	Private	T, C, S	16.6%	German	Generalist	Adv.
PRO 7	Private	T, C, S	18.6%	German	Generalist	Adv.
RTL 7	Private	C, S	9.2%	Polish	Generalist	Adv.
ORF 1	Public	T, S	11.6%	German	Generalist	L-F, Adv.
ORF 2	Public	T, S	11.2%	German	Generalist	L-F, Adv.
TVP 1	Public	T, S	14.4%	Polish	Generalist	L-F, Adv.
TVP 2	Public	T, S	11.8%	Polish	Generalist	L-F, Adv.
DSF	Private	T, C, S	10.6%	German	Sport	Adv.
NTV	Private	S	6.8%	German	Generalist	Adv.
RTL	Private	T, C, S	12.8%	German	Generalist	Adv.
VOX	Private	T, C, S	9.4%	German	Generalist	Adv.
POLSAT	Private	C, S	5.9%	Polish	Generalist	Adv.
VIVA	Private	C, S	6.3%	German	Music	Adv.
SUPER RTL	Private	C, S	5.2%	German	Generalist	Adv.

Sources: Taylor Nelson Sofres-ATO; IP-Prague

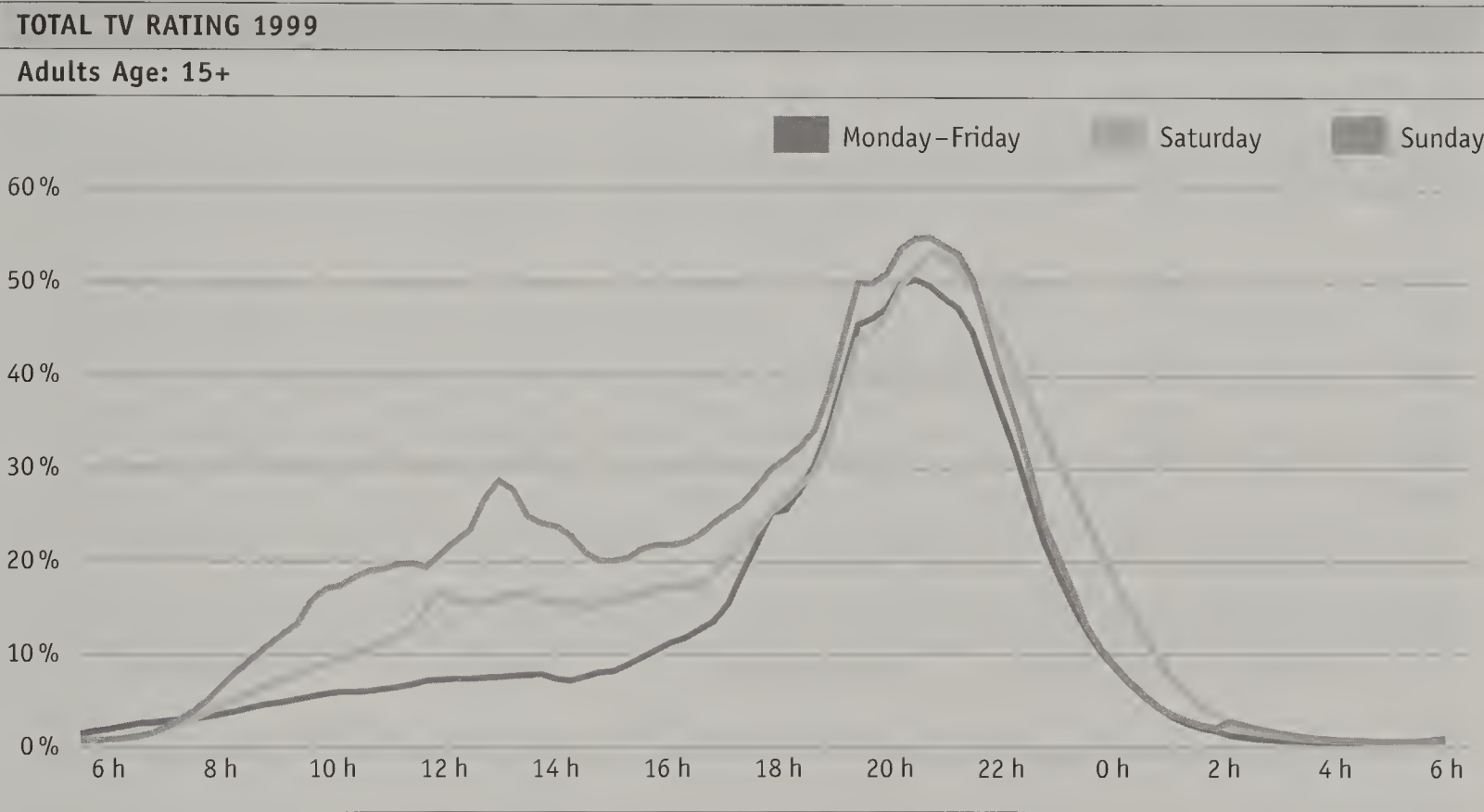
PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
HBO	1995	C	224 000	Czech	120	Movies	250	Sub.	HBO
HALLMARK	1991	C	444 000	Czech	133	Generalist	250 per pack.	Sub.	Kabel plus
SUPER MAX	1995	C	444 000	Czech	133	Children	250 per pack.	Sub.	Kabel plus
Max 1	1995	C	444 000	Czech	133	Documentaries	250 per pack.	Sub.	Kabel plus

Sources: Taylor Nelson Sofres-ATO; IP-Prague

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	Taylor Nelson Sofres-ATO	
Panel/Sampling Size	660 households, ca. 1 700 individuals	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	9 909	
Adults 15+	8 476	
Housewives 18+	3 922	
Young Adults 15-54	6 094	
Children 4-14	1 433	

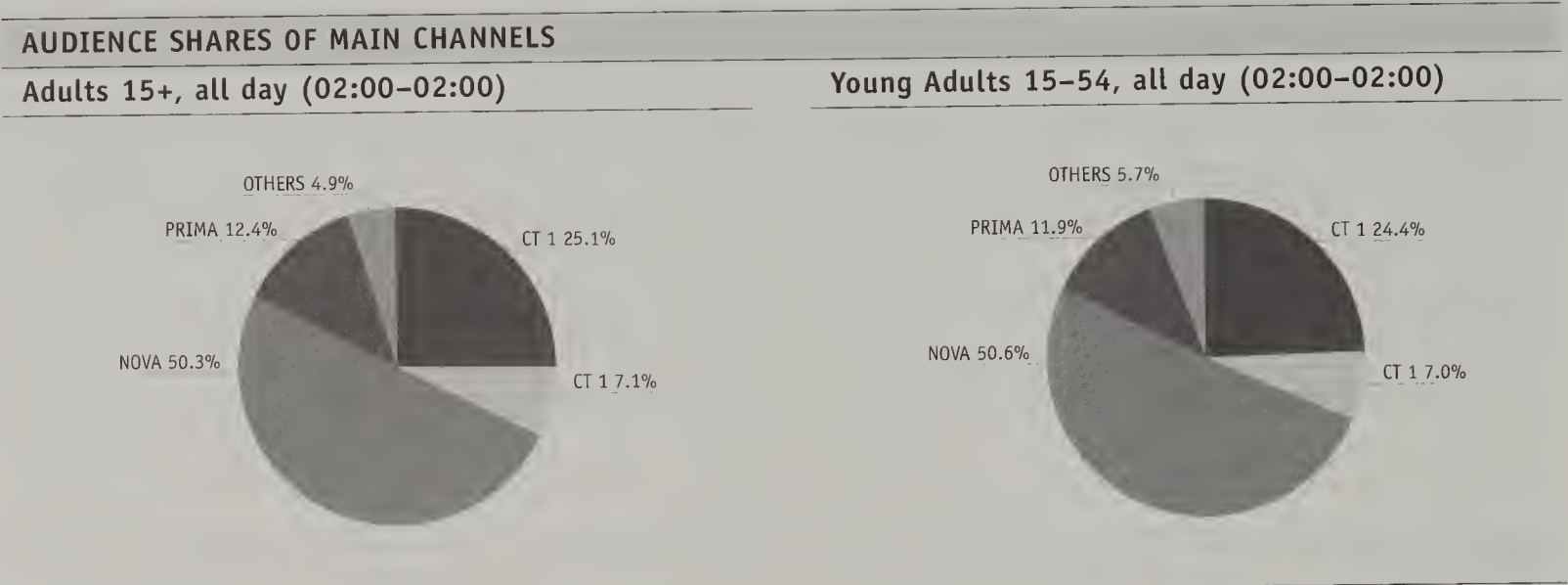
Source: Taylor Nelson Sofres-ATO



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 15+			Children 4-14			Young Adults 15-54			Housewives 18+		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	78.6	81.0	87.0	92.5	95.4	91.73	75.4	77.7	84.73	84.3	86.6	86.9
Viewing time per Viewer	244	245	226	164	156	143	224	221	202	264	264	261
Viewing time per Individual	192	198	197	155	149	131	169	172	171	223	229	227

Source: Taylor Nelson Sofres-ATO

Audience Shares



Source: Gallup A/S – a part of Taylor Nelson Sofres Plc

AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00								
	Adults 15+		Young Adults 15–54		Children 4–14		Housewives 18+	
	1998	1999	1998	1999	1998	1999	1998	1999
CT 1	26.5%	25.1%	24.3%	24.4%	24.8%	25.6%	26.9%	25.4%
CT 2	7.3%	7.1%	6.9%	7.0%	4.3%	5.0%	6.7%	6.0%
NOVA	51.6%	50.3%	53.0%	50.6%	54.3%	50.5%	52.1%	51.3%
PRIMA	11.1%	12.4%	11.2%	11.9%	11.0%	11.1%	11.5%	13.2%
OTHERS	3.5%	4.9%	4.4%	5.7%	5.4%	7.7%	2.8%	3.9%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 15+		Young Adults 15–54		Children 4–14		Housewives 18+	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6–19 h	19–22 h	6–19 h	19–22 h	6–19 h	19–22 h	6–19 h	19–22 h
CT 1	24.3%	27.6%	23.4%	27.6%	23.7%	30.2%	24.7%	27.5%
CT 2	9.4%	5.2%	9.6%	4.8%	6.0%	3.3%	7.5%	4.7%
NOVA	48.1%	51.9%	47.9%	52.1%	49.6%	50.9%	50.5%	52.3%
PRIMA	12.1%	12.1%	11.7%	11.7%	10.8%	11.8%	12.8%	12.7%
OTHERS	5.9%	3.1%	7.0%	3.7%	9.9%	3.7%	4.3%	2.9%

Source: Taylor Nelson Sofres–ATO

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
FIVE YEARS WITH YOU	Czech	Nova	Entertainment	20:01	04/02	52.8%	82.8%
NEW YEAR'S EVE (NEXT PART)	Czech	Nova	Entertainment	20:02	30/01	50.0%	78.2%
THE GOLDEN GRATE	Czech	Nova	Entertainment	20:33	13/02	48.8%	79.1%
NOVELTIES	Czech	Nova	Entertainment	20:00	17/01	48.0%	74.3%
TV NEWS	Czech	Nova	News	19:30	01/01	47.3%	76.1%
FIGURE SHOW	Czech	Nova	Entertainment	20:00	10/01	46.8%	72.4%
WORLD ENJOYS ME WITH YOU	Czech	Nova	Movie	20:02	01/01	46.5%	68.3%
ANNO '98	Czech	Nova	Entertainment	20:00	16/01	45.6%	74.6%
CZECH NIGHTINGALE	Czech	Nova	Entertainment	21:23	11/12	43.9%	77.2%
CANDID CAMERA	Czech	Nova	Entertainment	20:00	14/02	43.1%	70.0%
BABETA	Czech	Nova	Entertainment	20:01	28/02	42.4%	68.5%
ICE-HOCKEY W. CHMP CR-FINLAND	Czech	Nova	Sport	16:00	16/05	42.2%	87.8%
WEATHER NEWS	Czech	Nova	News	19:59	02/01	42.0%	72.6%
MISS CZ '99	Czech	Nova	Entertainment	20:32	10/04	41.8%	74.2%
RECORD IT	Czech	Nova	Entertainment	20:03	11/02	41.7%	72.7%
DESERT OF FIRE	Italy	Nova	Movie	20:01	20/01	41.4%	70.9%
FOLKCOUNTRY SHOW	Czech	Nova	Entertainment	20:00	03/01	40.9%	66.0%
NEW YEAR'S EVE 1999	Czech	Nova	Entertainment	20:57	31/12	40.8%	68.0%
I'M NOT DANCING WITH POLITICIANS	Czech	CT 1	Entertainment	20:03	30/12	39.6%	71.6%
LIFE ON THE CASTLE	Czech	CT 1	Series	20:03	13/12	34.8%	61.2%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
WOLRD ENJOYS ME WITH YOU	Czech	Nova	20:02	01/01	46.4%	68.2%
DESERT OF FIRE	Italy	Nova	20:01	20/01	41.4%	70.9%
GOLDENEYE	UK	Nova	20:01	02/01	39.0%	62.1%
HOT SHOTS	USA	Nova	20:55	10/01	34.3%	62.0%
WILD RIVER	USA	Nova	21:40	04/02	34.1%	83.9%
DON'T TELL MOM THE BABYSISTER'S DEAD	USA	Nova	20:51	31/01	33.3%	68.3%
I'M DOCILE HARBINGERING: I'M HERE	Czech	Nova	17:49	01/01	32.6%	68.9%
HOT SHOTS II	USA	Nova	20:56	17/01	32.5%	62.4%
ROBIN HOOD	USA	Nova	20:01	09/01	32.5%	54.9%
MANTRAP, MANTRAP, MANTRAPS	Czech	Nova	21:52	12/06	32.3%	78.8%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
ICE-HOCKEY W. CHMP CR-FINLAND		Nova	16:00	16/05	42.2%	84.7%
FBAL UEFA CR-SCOTLAND		Nova	20:20	09/06	25.0%	58.6%
RACE VELKA PARDUBICKA		CT 1	13:40	10/10	16.5%	52.3%
FBAL CFC BARCELONA-AC SPARTA PRAHA		CT 1	20:30	08/12	13.2%	31.3%
FIGURE SKATING EU CHMP		CT 2	20:31	31/01	10.8%	33.7%
ATHLETICS W. CHMP		CT 2	18:30	29/08	10.8%	22.6%
FBAL SK SLAVIA-AC SPARTA PRAHA		Nova	16:20	05/04	9.6%	39.3%
ICE-HOCKEY CR-CANADA		CT 2	20:45	12/02	8.8%	20.8%
ICE-HOCKEY CHMP VSETÍN-PRAHA		CT 2	18:35	08/04	8.7%	28.0%
SKIING W. CHMP		CT 2	12:00	21/02	7.6%	21.7%

Source: Taylor Nelson Sofres-ATO

Top Programmes Channel by Channel

CT 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
I DON'T DANCE WITH POLITICIANS	Czech	Comedy Show	11	20:03	67	39.6%	71.6%
LIVE ON THE CASTLE	Czech	Series Family	51	20:03	60	34.8%	61.3%
DON'T WAIT AND RECORD	Czech	Comedy Show	50	20:02	20	27.4%	49.5%
30 CASES OF MAJOR ZEMAN	Czech	Series Crime	20	20:09	70	26.1%	47.9%
MR. BEAN	UK	Comedy Show	10	20:01	20	26.0%	50.5%
NEWS	Czech	News	365	19:14	27	25.3%	50.9%
IT HAS EVER HAPPENED	Czech	Magazine	51	20:45	15	23.2%	38.5%
NEWS	Czech	News	365	17:50	10	21.6%	50.0%
TOUCHED BY AN ANGEL	USA	Series-Family	30	20:26	50	21.4%	39.6%
BACHELORS	Czech	Series-Family	35	20:03	60	21.2%	38.9%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE MOST POPULAR TV CELEBRITES	Czech	Variety Show	06/02	20:00	60	33.0%	53.1%
THE KING OF THE MOVIE SMILE	Czech	Variety Show	13/11	20:04	60	31.7%	58.1%
THE PRINCESS FROM CORN MILL	Czech	Movie	04/04	20:06	118	31.5%	54.1%
DED MORJOZ	Russia	Movie	31/12	16:20	120	27.0%	64.6%
TANK TROOP	Czech	Movie	14/12	20:32	94	26.0%	51.7%
CAESAR AND DRUMMER	Czech	Movie	24/12	19:30	98	25.9%	41.5%
STOP OR I WON'T HIT	Czech	Movie	06/06	20:03	84	25.4%	46.5%
CROCODILE DUNDEE II	USA	Movie	01/10	20:27	105	25.3%	51.8%
HE COMPELED US TO SMILE	Czech	Comedy Show	06/03	20:00	30	25.2%	45.5%
MONTE CRISTO	USA	Movie	19/11	20:27	118	24.9%	49.9%

Source: Taylor Nelson Sofres-ATO

CT 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
STUDIO SPORT	Czech	Sport-Magazine	51	16:15	98	9.8%	32.7%
HITLER: BILANCING	Germany	Documentary	25	20:00	50	9.4%	19.4%
CENSORED DREAMS	Czech	Documentary	11	20:00	60	7.6%	13.3%
21"	Czech	News	312	20:59	30	7.1%	17.3%
ALLO, ALLO	UK	Sitcom	40	18:48	30	6.8%	14.4%
HABSBURGS	Austria	Documentary	20	19:59	52	6.5%	12.6%
BIG ANCIENT CITIES	UK	Documentary	25	17:55	56	6.0%	17.7%
EXPEDITIONS TO MYSTERY	USA	Documentary	11	11:59	50	5.9%	25.5%
100 PHOTOGR. OF THE CENTURY	Czech	Documentary	15	21:32	6	5.5%	13.3%
CZECH SODA	Czech	Sitcom	5	22:06	15	4.8%	12.1%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL UEFA	Czech	Sport-Magaz.	31/03	21:59	120	15.0%	43.4%
FBAL UEFA-SUMMARY	Czech	Sport-Magaz.	28/09	21:33	10	12.2%	26.3%
WHEN BURIAN FIBBER	Czech	Documentary	25/12	11:41	95	12.0%	36.4%
HUMPBACK	France	Movie	27/02	16:59	100	11.9%	39.0%
WOODMAN	UK	Movie	31/10	17:30	101	11.6%	30.1%
THE HOARD ON THE SILVER LAKE	Germany	Movie	25/04	17:30	106	11.5%	35.4%
FBAL CL	Czech	Sport-Magaz.	03/11	20:25	90	11.3%	22.5%
FBAL CL	Czech	Sport-Magaz.	15/09	20:25	90	10.8%	25.4%
FIGURE SKATING EU CHMP		Sport	31/01	14:55	154	10.8%	33.6%
FBAL CL	Czech	Sport-Magaz.	20/10	20:25	140	10.8%	23.8%

Source: Taylor Nelson Sofres-ATO

NOVA							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NOVELTIES	Czech	Comedy Show	10	20:00	50	48.0%	74.3%
TV NEWS	Czech	News	365	19:30	22	47.3%	76.1%
FIGURE SHOW	Czech	Comedy Show	13	20:00	51	46.8%	72.4%
SPORT NEWS	Czech	Sport	365	19:53	8	43.3%	73.7%
CANDID CAMERA	Czech	Comedy Show	5	20:00	40	43.1%	70.0%
WEATHER NEWS	Czech	News	365	19:59	5	42.0%	72.6%
RECORD IT	Czech	Comedy Show	50	20:03	25	41.7%	72.1%
FOLK-COUNTRY SHOW	Czech	Comedy Show	8	20:00	50	40.9%	66.0%
DUCKIES	Czech	Comedy Show	5	20:02	53	39.7%	67.5%
TODAY	Czech	News	365	21:42	5	39.0%	64.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FIVE YEARS WITH YOU	Czech	Variety Show	04/02	20:01	65	52.8%	82.8%
ICE-HOCKEY W. CHMP		Sport	16/05	18:37	122	51.4%	87.8%
NEW YEAR'S EVE (NEXT PART)	Czech	Variety Show	30/01	20:02	70	50.0%	78.7%
WORLD ENJOYS ME WITH YOU	Czech	Movie	01/01	20:02	105	46.5%	68.3%
ANNO '98	Czech	Variety Show	16/01	20:00	60	45.6%	74.6%
CZECH NIGHTINGALE	Czech	Variety Show	11/12	21:23	60	44.0%	77.2%
BABETA	Czech	Comedy Show	28/02	20:01	60	42.4%	68.5%
MISS CZ '99	Czech	Variety Show	10/04	20:32	60	41.8%	74.2%
HOT SHOTS	USA	Movie	10/01	20:55	112	34.3%	62.0%
DON'T TELL MOM*	USA	Movie	31/01	20:51	96	33.3%	68.2%

Source: Taylor Nelson Sofres-ATO

*THE BABYSISTER'S DEAD

PRIMA							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NO ONE IS ACCOMPLISHED	Czech	Comedy Show	51	20:56	58	18.9%	36.6%
KOMMISSAR REX	Germany	Series Crime	40	19:57	51	16.0%	31.0%
DAILY NEWS	Czech	News	365	18:59	11	13.6%	32.7%
CARUSO SHOW	Czech	Comedy Show	54	19:49	58	13.2%	23.9%
WOLF'S DISTRICT	Germany	Series-Crime	40	19:58	45	11.2%	20.8%
VATER SCHWARZ III	Germany	Series-Family	35	19:57	40	10.9%	19.3%
NO POGODI	Russia	Cartoons	25	19:45	8	10.5%	21.9%
BION	USA	Series	10	20:50	55	10.3%	19.0%
TOM AND JERRY	USA	Cartoons	45	19:46	7	10.3%	21.1%
THORN	Czech	Talk Show	49	20:44	45	10.2%	19.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
DARK AREA	USA	Movie	17/11	19:58	105	17.2%	31.8%
THE GOOD SOLDIER „SVEJK“	Czech	Movie	25/12	15:04	96	16.1%	45.7%
AGGRESSION IN PACIFIC	USA	Movie	10/11	19:59	105	15.0%	29.3%
MISSIS '99	Czech	Variety Show	28/01	20:38	60	14.6%	26.5%
FBAL UEFA		Sport	09/10	21:09	90	13.7%	29.0%
ANGEL IN MOUNTAINS	Czech	Movie	02/01	15:30	84	13.1%	38.8%
TWO COPS	USA	Movie	22/12	20:00	98	12.6%	27.8%
E.T.	USA	Movie	01/12	19:58	118	11.2%	23.2%
ADVENTURER	USA	Movie	24/11	20:00	103	10.9%	22.2%
THE PRINCESS*	Czech	Movie	24/ 12	15:36	86	10.7%	32.1%

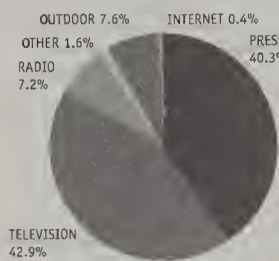
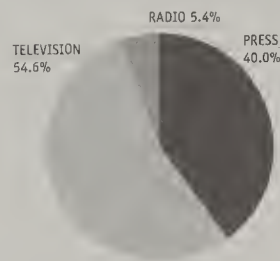
Source: Taylor Nelson Sofres-ATO

*WITH GOLDEN STAR ON BROW

Advertising Expenditure

ADVERTISING FIGURES	GROSS	NET
Total adspend (in million CZK)	21 008	12 660
Total adspend (in million USD)	585	352
Total adspend (in million EUR)	582	350
TV adspend (in million CZK)	11 478	5 430
TV adspend (in million USD)	319	151
TV adspend (in million EUR)	318	150
TV adspend in % of GDP	0.61	0.29
TV adspend per capita (USD)	31	14

SHARE OF MEDIA EXPENDITURE	GROSS/NET
Category: Market Share in %	



Total Revenue (Gross)

in million CZK: 21 008
in million EUR: 582

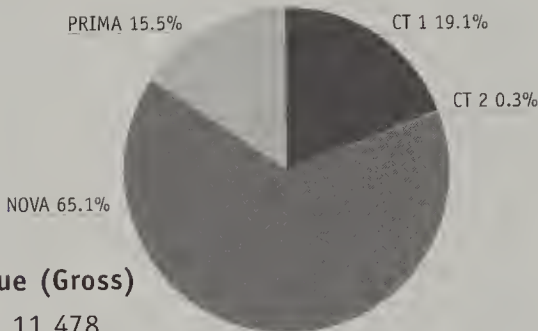
Total Revenue (Net)

in million CZK: 12 660
in million EUR: 351

TV ADVERTISING STATISTICS	
Total number of spots broadcast	114 639
Average spot length (in sec.)	22.5
Total number of advertisers	11 746
Number of TV advertisers	730
Total number of advertised products	19 319
Number products advertised on TV	1 502

Source: Gross: Taylor Nelson Sofres A-connect, (including TV, Radio, Press),
Net: IP Praha , (including TV, Radio, Press, Internet, Outdoor)

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



Total TV Revenue (Gross)

in million CZK: 11 478
in million EUR: 318

TOP 10 ADVERTISING FIGURES GROSS				
TV Advertising Sectors	3 Media*	Television	Spent in TV	Share of TV Expenditure
FOODS	5 249	4 763	90.7%	41.5%
DRUG, CLEANERS AND PARFUMERY	3 038	2 595	49.4%	22.6%
FREE TIME	2 889	782	14.9%	6.8%
HOME & OFFICE EQUIPMENT	2 524	954	18.2%	8.3%
BANKING	1 955	969	18.5%	8.4%
VEHICLES	1 788	626	11.9%	5.5%
NON-COMMERCIAL ACTIVITIES	1 350	1	0.0%	0.0%
SERVICES	436	120	2.3%	1.0%
HEALTH CARE	405	238	4.5%	2.1%
COMMERCIAL, MARKETING & ADVERTISEMENT	243	46	0.9%	0.4%
OTHER	1 131	383	7.3%	3.3%
TV Advertisers				
DANONE A.S.	1 317	1 274	96.7%	11.1%
PROCTER & GAMBLE CR	652	652	99.9%	5.7%
BENCKISER-COTY	540	540	100.0%	4.7%
NESTLE FOOD CR	471	470	99.8%	4.1%
UNILEVER CR	447	447	99.9%	3.9%
PEPSI-COLA CR S.R.O.	306	304	99.3%	2.6%
WRIGLEY'S S.R.O.	286	286	100.0%	2.5%
KRAFT JACOBS SUCHARD	249	249	99.8%	2.2%
EUROTEL	640	238	37.1%	2.1%
HENKEL	221	221	100.0%	1.9%
OTHER	15 887	6 797	42.8%	59.2%
Total (in million CZK)	21 008	11 478	57%	100.0%
Total (in million EUR)	582	318	57%	100.0%

Source: Aconnect

*TV, radio and press

1999 was the year of elections in Estonia – elections of Parliament in spring and elections of the local authorities in autumn. Former opposition came to power bringing changes in many spheres, including the television market. The Russian crisis effected an economic decline in the Estonian economy.

The year started with an uncertainty for private national channels TV 3 and Kanal 2. At the end of 1998, a bid for the two licences was announced. The results of the competition were announced in February 1999 and meant that TV 3 and Kanal 2 national licences were continued. In 1999, it was announced that TV 3 together with Latvian TV 3, Lithuanian TV 3 and also TV 1000 had started closer co-operation concerning advertising sales and programme supply with channels of their Scandinavian owners and so formed the biggest programming network in the region – Viasat.

The third private national channel TV 1 was sold to an investment bank LHV at the end of 1999, whose purchase was driven by their intention to resell the channel. At the same time, it was announced that TV1 had signed a co-operation document with Latvian channel LNT and Lithuanian Baltijos TV for programme supply and advertising sales. A couple of weeks later, just before Christmas, the merger of Estonian TV1 with Latvian LNT and Lithuanian Baltijos TV took place through sales of 49% of TV1 shares to LNT, whereby all three of the channels were either directly or indirectly owned by Polish broadcaster Polsat. This merger meant that a TV network covering both the Baltic States and Poland was formed.

ETV, the only public national channel in Estonia, had to cope with changes in 1999. ETV had decided to give up advertising since 1998 and finance itself through a special fee paid on a contractual basis by private channels for non-advertising public TV (in addition to state budget). This decision was made before the Russian crisis and supported by politicians and competitors. But the economic crisis in Russia had a sobering affect on the economy of Estonia.

The state budget for 1999, enabling sufficient funds for ETV, was compiled by the previous government of Estonia, whose idea was to use reserve funds to overcome the difficult situation. The new elected government rewrote the new balanced state budget in April 1999, cutting costs in every sector including public television.

ETV was not prepared for cutting funds, and had to look for alternative financing for 1999. Costs were somewhat cut but a lack of funds remained. It also transpired that the private channels had not been paying the special fee on time. The management of ETV took the opportunity and, giving the unpaid fees as an excuse, broke the deal of non-advertising and brought commercials back on the air of ETV. Dissatisfaction of private broadcasters, the Board of Broadcasting, and complaints of channel employees brought matters of management and effi-

ciency of ETV under public attention, leading to a firing-spree of ETV's general managers in autumn 1999.

ETV and TV 1, who had difficult conditions, had to give up some own programming and change the profile of programmes in 1999. Although the end of 1999/beginning of 2000 brought more stability, both channels had, as a result, lost a certain amount of viewers. Kanal 2 increased the share of local programming in its schedule which had a very positive influence on viewing ratings. TV3 improved its programming by the merger in Viasat and was able to maintain its position in the market.

An important technical innovation in the Estonian television broadcasting market was moving from SECAM transmission system to PAL system. By the end of 1999, all the channels broadcasted their programme in PAL.

The cable TV market was regulated with the Cable Distribution Act in 1999. The purpose of the Act is to create conditions for active competition in the telecommunication sector in Estonia and to protect consumers from substandard cable distribution services. The latest cable TV launches in Estonia date back to 1998 when ORT Balt and TV 1000 were started. ORT Balt is not in fact a separate cable channel but retranslated programme of Russian channel ORT including local advertising windows sold by Estonian broadcaster TV1. 1999 did not bring any radical changes. The end of national telecom company's monopoly rights will influence the situation in the telecommunication market in 2001, giving first signs in tense relationships among cable distributors in the first months of 2000.

The advertising market was influenced by the decline in the economy. The total advertising expenditure decreased by 10% compared to 1998.

Of all the media sectors, the crisis had the most serious impact on television, where TV advertising expenditure decreased 28% in 1999 compared to 1998. Significant increases in advertised product groups were seen in political advertising (year of elections) and beverages.

Estonia

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General Data

COUNTRY	
Land area (km ²)	45 394
Total population ¹	1 445 580
Number of households ²	570 000
Average household size	2.5
In % of population equipped	
Phone (in %)	78.0
Mobile telephone subscribers (in %)	33.0
PC/laptop at home (in %)	17.0
Internet at home (in %)	7.0
Internet user, last 6 month (in %)	21.0

Sources: BMF Gallup Media, National Readership Survey Autumn 1999
¹Statistical Office of Estonia, ²in 1998

TV OVERVIEW	
Total number of TV households ¹ (TVHH)	540 000
In % of all households	97.0
Numbers of channels received by 70% of the population	4
TV License-Fee cost per year	none

TV EQUIPMENT	
	in % of TVHH
Colour TV	96.6
Multiset (homes with more than 1 TV set)	34.1
VCR	35.3
Teletext	42.6
Remote control	79.0

Sources: BMF Gallup Media, National Readership Survey autumn 1999, ¹in 1998

ECONOMICS	
GDP in million EEK (at current prices)	73 213
GDP per capita in EEK (at current prices)	50 646
Inflation rate in 1999 (in %)*	3.0
Value of EEK in Euro (EUR)	1 EUR = 15.65 EEK
Value of EEK in US-Dollar (USD)	1 USD = 14.68 EEK

Sources: Statistical Office of Estonia, *Public Information on prive level changes
The Bank of Estonia

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	40.2
Satellite	private dish/DTH	4.0
	collective dish/SMATV	6.9
Terrestrial	analog	100.0
	digital	none
	MMDS	none

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a	Digital TV subscribers	none

Sources: BMF Gallup Media

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
ETV	1955	T,C	100%	Estonian	82	Generalist	Gvt, Adv, Spon	In-house

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
KANAL 2	1993	T,C	100%	Estonian	119	Generalist	Adv, Spon	In-house
TV 3	1993/1996	T,C	95%	Estonian	126	Generalist	Adv, Spon	In-house
TV 1	1997	T,C,S	75%	Estonian	133	Generalist	Adv, Spon	In-house

Source: BMF Gallup Media, broadcasters

INTERNATIONAL/PAN EUROPEAN CHANNELS					
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming
EUROSPORT	Private	C, S	36.8%	English/German	Sport
DISCOVERY	Private	C, S	31.2%	English	Documentaries
MTV	Private	C, S	24.7%	English	Music
CARTOON NETWORK	Private	C, S	22.4%	English	Cartoons
ANIMAL PLANET	Private	C, S	19.3%	English	Nature
CNN	Private	C, S	18.3%	English	News
TNT (CLASSIC MOVIES)	Private	C, S	16.1%	English	Movies
EURONEWS	Private	C, S	14.7%	English	News
BBC WORLD	Private	C, S	13.8%	English	Generalist
TV5	Public	C, S	13.5%	French	Generalist
NATIONAL GEOGRAPHIC	Private	C, S	11.9%	English	Documentaries
HALLMARK	Private	C, S	10.2%	n.a.	n.a.
ARTE	Public	C, S	9.6%	French	Generalist

Sources: BMF Gallup Media, National Readership Survey autumn 1999

OTHER FOREIGN CHANNELS					
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming
RTR	Public	T, C, S	44.8%	Russian	Generalist
VIVA II	Private	C, S	13,8%	German	Music
VOX	Private	C, S	11.8%	German	Generalist
ORT BALT	Public.	C, S	37.4%	Russian	Generalist
YLE 2	Public	T, C	36.4%	Finnish	Generalist
YLE 1	Public	T, C	36.3%	Finnish	Generalist
MTV 3	Private	T, C	35.9%	Finnish	Generalist
TV 6 MOSKVA	Private	C, S	28.1%	Russian	Generalist
NELONEN	Private	T, C	24.7%	Finnish	Generalist
NTV	Private	C, S	22.2%	Russian	Generalist
TV-TSENTR	Private	C, S	21.3%	Russian	Generalist
REN TV	Private	C, S	21.1%	Russian	Generalist
TNT	Private	C, S	20.9%	Russian	Movies
NTV+NASHE KINO	Private	C, S	20.4%	Russian	Movies
ORT	Public	T, C, S	19.0%	Russian	Generalist
NTV+MIR KINO	Private	C, S	18.8%	Russian	Movies
STV 4	Public	T, C	18.7%	Swedish	Generalist
AST	Private	C, S	18.1%	Russian	Generalist
NTV+DETSKI MIR	Private	C, S	14.9%	Russian	Children
MTV ROSSIJA	Private	C, S	12.9%	Russian	Music
NTV INTERNATIONAL	Private	C, S	12.6%	Russian	Generalist
NTV+SPORT 1	Private	C, S	12.4%	Russian	Sport
RTL 2	Private	C, S	27.7%	German	Movies, Serials
PRO 7	Private	C, S	26.7%	German	Movies, Serials
RTL	Private	C, S	26.7%	German	Movies, Serials
VIVA	Private	C, S	23.4%	German	Music
SAT 1	Private	C, S	19.0%	German	Generalist

Source: BMF Gallup Media, National Readership Survey autumn 1999

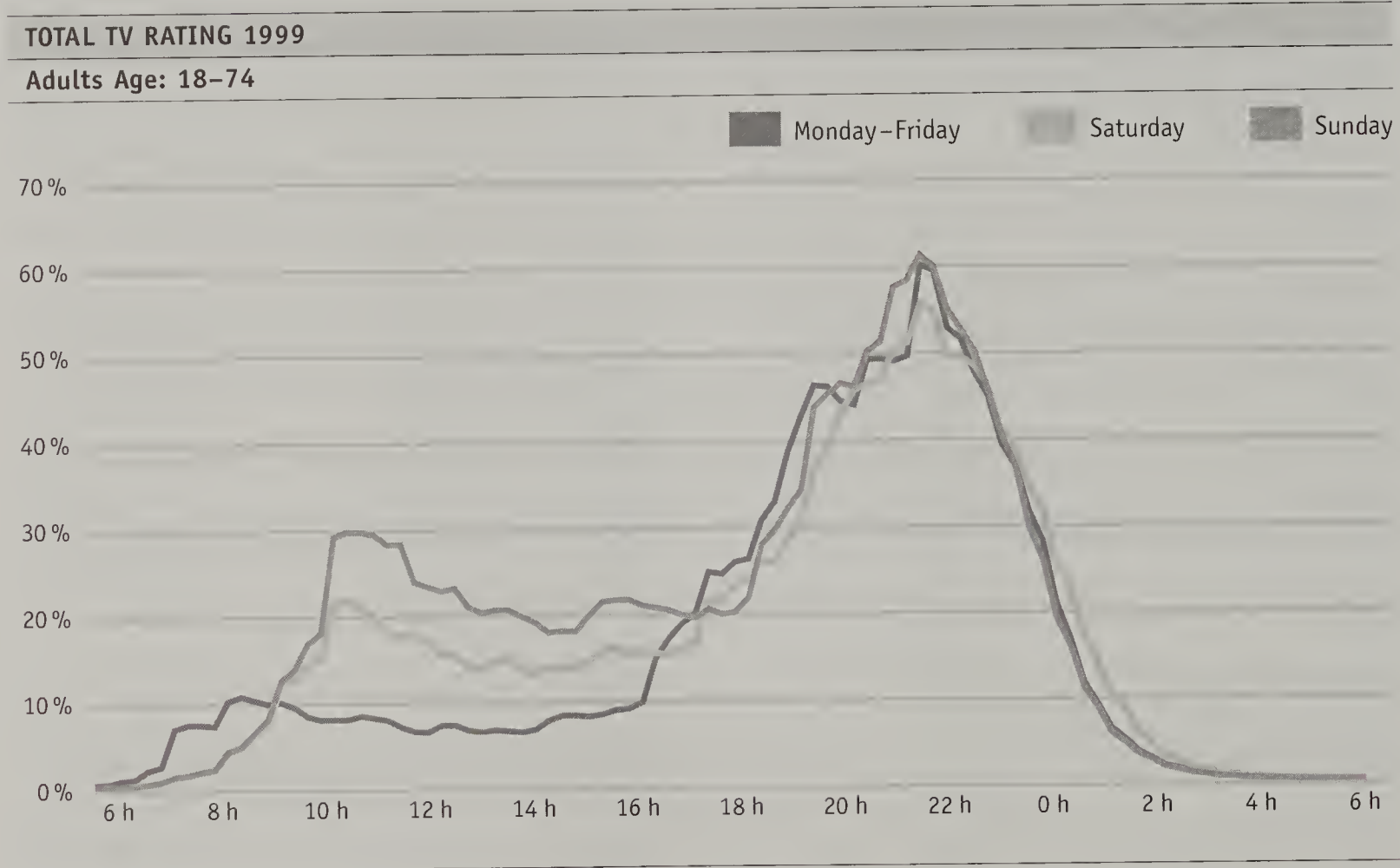
PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue
TV 1000	1998	C	n.a.	Estonian/Russian subtitles	84	Movie	150 EEK	Sub.

Source: BMF Gallup Media

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	TV and Radio Audience Survey/BMF Gallup Media	
Panel/Sampling Size	2 000–2 500 Individuals	
Instrument used (people-meter, telefon, face-to-face)	diary	
	Population size in 000	
Individuals 12–74	1 169	
Adults 18–74	1 033	
Main Purchase Responsibles/Housewives	495	
Young Adults 18–30	268	
Children 12–17	137	

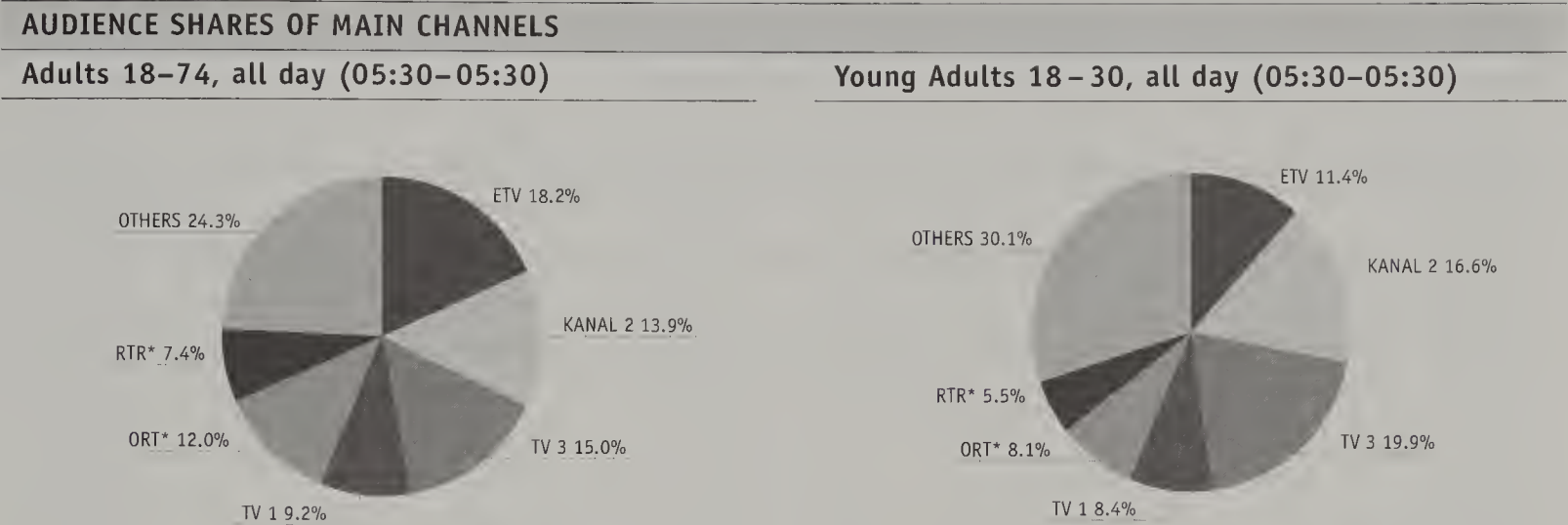
Source: BMF Gallup Media, TV and Radio Diary Survey



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 18–74			Children 12–17			Young Adults 18–30			Main Purchase Responsibles		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	91.0	92.0	92.0	92.0	92.0	92.0	88.0	88.0	89.0	93.0	94.0	93.0
Viewing time per Viewer	264	266	282	223	235	233	281	266	276	273	278	299
Viewing time per Individual	240	245	259	205	216	214	247	234	246	254	261	278

Sources: BMF Gallup Media, TV and Radio Diary Survey, November 1997, November 1998, November 1999

Audience Shares



Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)						
Title	Land	Channel	Genre	Start.Time	Date	Audience
SKI W. CHMP. M		ETV	Sport	11:15	28.02.1999	35.7%
GRAND PRIX EUROV. DE LA CHANSON 99		ETV	Variety Show	22:00	29.05.1999	34.2%
GOLDEN 3	Estonia	ETV	Music	21:15	31.12.1998	31.7%
KREISIRAADIO	Estonia	ETV	Comedy Show	22:30	31.12.1998	31.1%
THE YEAR OF SATAN	Estonia	ETV	Comedy Show	20:30	31.12.1998	29.3%
NEW YEAR GREETINGS*	Estonia	ETV	Other	23:45	31.12.1998	29.1%
LIFE OF ESTONIA IN 1998	Estonia	ETV	Magazine	21:30	31.12.1998	28.6%
CROSS-COUNTRY-SKI W. CUP W		ETV	Sport	10:30	13.12.1998	28.3%
EVERY BONF. WILL LIGHT UP THE NIGHT	Estonia	ETV	Music	22:00	31.12.1998	28.2%
FULL CIRCLE	Estonia	ETV	Music	23:00	31.12.1998	27.3%
GRAND PRIX (NATIONAL CONTEST)	Estonia	ETV	Variety Show	21:45	30.01.1999	26.5%
SOUND OF MUSIC	USA	TV 3	Movie	12:00	01.01.1999	26.5%
GOLDEN DISC	Estonia	ETV	Variety Show	19:45	31.12.1998	26.5%
ÕNNE 13	Estonia	ETV	Series-Family	20:30	n.a.	26.1%
KING ARTHUR GALA	Estonia	ETV	Music	23:30	31.12.1998	24.8%
CROSS-COUNTRY-SKI W. CUP W		ETV	Sport	10:00	10.01.1999	24.7%
SKIING W. CHMP W		ETV	Sport	11:15	27.02.1999	24.6%
DATING GAME	Estonia	ETV	Game Show	20:30	n.a.	24.1%
AKTUAALNE KAAMERA	Estonia	ETV	News	21:00	n.a.	23.6%
LA DOLCE VITA	Estonia	ETV	Comedy Show	19:30	31.12.1998	23.2%
Sources: BMF Gallup Media, TV and Radio Diary Survey, Period: 02/12/98-30/11/99				*FROM THE PRESIDENT OF THE REPUBLIC OF ESTONIA		

TOP 10 MOVIES					
Title	Land	Channel	Start.Time	Date	Audience
SOUND OF MUSIC	USA	TV 3	12:00	01.01.1999	26.5%
POLICE ACADEMY 5	USA	Kanal 2	21:30	02.12.1998	19.7%
HOT SHOTS!	USA	Kanal 2	20:30	26.11.1999	18.4%
POLICE ACADEMY 3	USA	Kanal 2	20:30	15.10.1999	17.8%
POLICE ACADEMY 6	USA	Kanal 2	21:30	09.12.1998	17.8%
FOUR WEDDINGS AND FUNERAL	UK	ETV	21:30	26.12.1998	17.6%
POLICE ACADEMY 6	USA	Kanal 2	20:30	05.11.1999	17.4%
POLICE ACADEMY 5	USA	Kanal 3	21:30	29.10.1999	17.4%
ACE VENTURA–WHEN NATURE CALLS	USA	Kanal 2	20:30	19.11.1999	17.1%
TWINS	USA	TV3	21:15	07.11.1999	16.9%
Sources: BMF Gallup Media, TV and Radio Diary Survey, Period: 02/12/98–30/11/99					

TOP 10 SPORT EVENTS				
Title	Channel	Start.Time	Date	Audience
SKI W. CHMP M.	ETV	11:15	28.02.1999	35.7%
CROSS-COUNTRY SKI W. CUP W	ETV	10:30	13.12.1998	28.3%
CROSS-COUNTRY SKI W. CUP W	ETV	10:00	10.01.1999	24.7%
SKI W. CHMP W	ETV	11:15	27.02.1999	24.6%
CROSS-COUNTRY SKI W. CUP W	ETV	09:40	05.01.1999	18.7%
ATHLETICS W. CHMP	ETV	21:15	27.08.1999	18.3%
SKI W. CHMP W	ETV	10:20	23.02.1999	18.2%
CROSS-COUNTRY SKI W. CUP M	ETV	12:00	10.01.1999	18.1%
SKI W. CHMP M	ETV	11:15	23.02.1999	17.3%
ATHLETICS W. CHMP	ETV	21:30	22.08.1999	17.3%
Sources: BMF Gallup Media, TV and Radio Diary Survey, Period: 02/12/98–30/11/99				

Top Programmes Channel by Channel

ETV						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
ÕNNE 13	Estonia	Series--Family	42	20:30	30	26.1%
DATING GAME	Estonia	Game Show	43	20:30	30	24.1%
ACTUAL CAMERA	Estonia	News	51	21:00	15	23.6%
FAMOUS OR STRANGE?	Estonia	Game Show	49	20:30	30	22.0%
ACTUAL CAMERA. WEATHER	Estonia	News	313	21:00	20	21.9%
ENVIRONMENT NEWS	Estonia	News	40	21:15	10	19.1%
STARS IN MUSIC	Estonia	Game Show	20	19:45	40	17.8%
BROWSER	Estonia	Magazine	34	21:15	20	17.6%
WHITNESS	Estonia	TV Magazine	9	20:10	50	17.3%
M(EN) CLUB	Estonia	Series	10	21:30	30	16.5%

Top 10 Single Programmes	Land	Genre	Start.Time	Date	Length (m.)	Audience
SKI W. CHMP M	Estonia	Sport	11:15	28.02.1999	150	35.7%
GRAND PRIX EUROV. DE LA CH. 99	Estonia	Variety Show	22:00	29.05.1999	195	34.2%
GOLDEN 3	Estonia	Music	21:15	31.12.1998	15	31.7%
KREISIRAADIO	Estonia	Comedy Show	22:30	31.12.1998	30	31.1%
THE YEAR OF SATAN	Estonia	Comedy Show	20:30	31.12.1998	30	29.3%
NEW YEAR GREETINGS*	Estonia	Other	23:50	31.12.1998	10	29.1%
LIFE OF ESTONIA IN 1998	Estonia	Magazine	21:30	31.12.1998	30	28.6%
CROSS-COUNTRY SKI W. CUP W	Estonia	Sport	10:30	13.12.1998	35	28.3%
EV. BONF. WILL LIGHT UP THE NIGHT	Estonia	Music	22:00	31.12.1998	30	28.2%
FULL CIRCLE	Estonia	Music	23:00	31.12.1998	10	27.3%

Sources: BMF Gallup Media, TV and Radio Diary Survey, Period: 02/12/98–30/11/99

*FROM THE PRESIDENT OF THE REPUBLIC OF ESTONIA

KANAL 2						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
ESMERALDA	Mexico	Series	70	17:00	50	15.8%
CRIMINAL CHRONICLE	Estonia	Police News	44	20:00	30	11.3%
DESTINY OF A WOMAN	Venezuela	Series	134	17:00	50	9.3%
GIPSY LOVE	Mexico	Series	55	17:00	50	9.1%
POLICE ACADEMY	USA	Series	13	20:00	60	8.3%
DALLAS	USA	Series	35	21:30	60	7.7%
RETURN TO EDEN	USA	Short Series	12	17:45	30	7.3%
CHARMED	USA	Series	17	20:30	50	7.3%
ANIMAL DOCTORS	Estonia	Document. Series	8	20:00	30	7.1%
WIGLA SHOW	Estonia	Entertainment	45	20:00	20	7.1%

Top 10 Single Programmes	Land	Genre	Start.Time	Date	Length (m.)	Audience
POLICE ACADEMY 5	USA	Movie	21:30	02.12.1998	95	19.7%
HOT SHOTS	USA	Movie	20:30	26.11.1999	95	18.4%
POLICE ACADEMY 3	USA	Movie	20:30	15.10.1999	90	17.8%
POLICE ACADEMY 6	USA	Movie	21:30	09.12.1998	95	17.8%
POLICE ACADEMY 6	USA	Movie	20:30	05.11.1999	95	17.4%
POLICE ACADEMY 5	USA	Movie	21:30	29.10.1999	95	17.4%
ACE VENTURA--WHEN NATURE CALLS	USA	Movie	20:30	19.11.1999	65	17.0%
POLICE ACADEMY 4	USA	Movie	20:30	22.10.1999	95	16.6%
POLICE ACADEMY	USA	Movie	20:30	01.10.1999	95	16.1%
POLICE ACADEMY 2	USA	Movie	20:30	08.10.1999	95	15,5%

Sources: BMF Gallup Media, TV and Radio Diary Survey, Period: 02/12/98–30/11/99

TV 3						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
POLICE WEEK	Estonia	Police News	51	20:00	30	13.3%
X-FILES	USA	Series	52	21:00	60	11.6%
THE BOLD AND BEAUTIFUL	USA	Daily Soap	258	18:15	45	10.8%
JEOPARDY!	Estonia	Game Show	63	20:00	30	10.1%
BINGO LOTTERY	Estonia	Lottery	52	21:30	30	9.5%
EESTI EKSPR.-THE PRICE IS RIGHT	Estonia	Lottery	17	20:00	30	9.1%
ALLY MCBEAL	USA	Series	34	21:00	55	9.0%
MELROSE PLACE	USA	Series	52	21:00	60	8.8%
FORK	Estonia	Entertainment	42	22:15	75	8.8%
MURDER SHE WROTE	USA	Series-Crime	8	18:15	45	8.0%

Top 10 Single Programmes	Land	Genre	Start.Time	Date	Length (m.)	Audience
SOUND OF MUSIC	USA	Movie	12:00	01.01.1999	165	26.5%
TWINS	USA	Movie	21:15	07.11.1999	105	16.9%
TRUE LIES	USA	Movie	22:00	21.12.1998	150	16.2%
SISTER ACT II: BACK IN THE HABIT	USA	Movie	22:00	05.07.1999	105	15.9%
KNIGHTRIDER 2000	USA	Movie	21:20	02.10.1999	95	15.7%
COMMANDO	USA	Movie	22:00	05.10.1999	90	15.5%
KINDERGARTEN COP	USA	Movie	20:25	24.04.1999	120	15.4%
COMMANDO	USA	Movie	22:00	25.01.1999	90	15.4%
SPLASH	USA	Movie	21:15	03.10.1999	115	15.3%
JUNIOR	USA	Movie	20:25	06.03.1999	120	15.2%

Sources: BMF Gallup Media, TV and Radio Diary Survey, Period: 02/12/98-30/11/99

TV 1						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience
MARIA ISABEL	Mexico	Series	63	19:00	30	14,2%
HOME AND AWAY	Australia	Daily Soap	332	19:30	30	12,6%
THE PRIVILEGE OF LOVING	Mexico	Series	190	18:35	55	12.0%
PRECIOUS ONE	Mexico	Series	6	18:35	55	8,7%
MAIRE AUNASTE TALK SHOW	Estonia	Talk Show	38	21:15	60	5,7%
ZORRO	USA	Series	22	18:05	25	5,6%
NEWS AND WEATHER	Estonia	News	335	20:00	20	5,2%
E.R.	USA	Series	20	20:20	50	5,2%
KOMISSAR REX	Germany	Series	14	19:00	60	5,2%
DISCOVERY NATURE SERIES	USA	Nature Series	33	21:15	60	5,0%

Top 10 Single Programmes	Land	Genre	Start.Time	Date	Length (m.)	Audience
ROYAL WEDDING	UK	Special Event	18:30	19.06.1999	90	13.1%
SUMMER	Estonia	Movie	20:20	24.02.1999	90	12.0%
SPRING	Estonia	Movie	20:40	02.02.1999	90	11.5%
HAPPY BIRTHDAY, IFF!	Estonia	Entertain.	20:30	19.06.1999	120	10.8%
DISCOVERY PRESENTS: FREE WILLY	USA	Document.	21:10	17.03.1999	50	10.5%
LAST RELICS	Estonia	Movie	20:15	05.01.1999	90	10.0%
SNIPER	USA	Movie	20:45	04.02.1999	90	9.5%
KAVKAZSKAJA PLENNITSA*	Russia	Movie	11:00	21.02.1999	75	9.1%
BEHIND THE SCENE: HOME & AWAY	Australia	Documentary	19:00	n.a.	30	9.0%
GOOD OLD KULDNE TRIO	Estonia	Entertainment	19:30	31.12.1998	30	9.0%

Sources: BMF Gallup Media, TV and Radio Diary Survey, Period: 02/12/98-30/11/99

*ILI NOVIJE PRIKLUCHENIJA SHURIKA

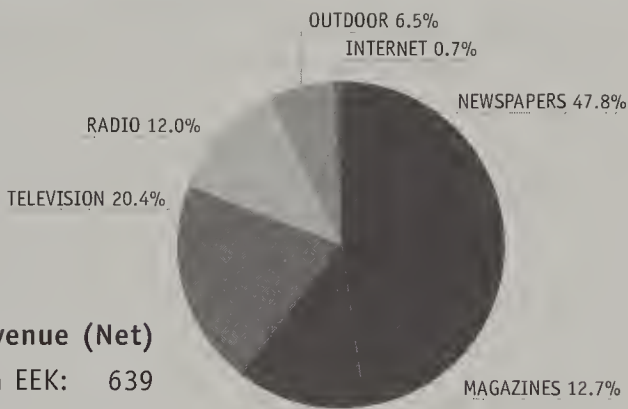
Advertising Expenditure

ADVERTISING FIGURES		NET
Total adspend	(in million EEK)	639
Total adspend	(in million USD)	44
Total adspend	(in million EUR)	41
TV adspend	(in million EEK)	130
TV adspend	(in million USD)	9.0
TV adspend	(in million EUR)	8
TV adspend	in % of GDP	0.18
TV adspend	per capita (USD)	6.3

TV ADVERTISING STATISTICS	
Total number of spots broadcast	106 566
Average spot length (in sec.)	25
Total number of advertisers	17 349
Number of TV advertisers	801
Total number of advertised products	26 617
Number products advertised on TV	1 378

Sources: BMF Gallup Media, Advertising Expenditure Survey
Net prices are calculated based on average discount levels in specific media type, excluding VAT, media own advertising and sponsorship.

SHARE OF MEDIA EXPENDITURE	NET
Category: Market Share in %	



Total Revenue (Net)
in million EEK: 639
in million EUR: 40.8

TOP 10 ADVERTISING FIGURES NET				
TV Advertising Sectors	5 Media*	Television	Spent in TV	Share of TV Expenditure
COSMETICS, PERSONAL HYGIENE	51.0	35.6	70%	27%
HOUSEHOLD GOODS	38.5	23.9	62%	18%
FOOD PRODUCTS	38.0	17.0	45%	13%
ENTERTAINMENT, CULTURE, RECREATION	61.0	8.5	14%	7%
NON-ALCOHOLIC BEVERAGES	12.8	7.5	59%	6%
MEDICINE	20.6	7.5	36%	6%
COMMUNIC., ELECTRONICS, COMPUTERS	89.1	4.9	6%	4%
ALCOHOLIC BEVERAGES, TOBACCO	24.5	4.9	20%	4%
SOCIAL ADVERTISING	26.5	4.0	15%	3%
CONSTRUCTION, FURNITURE	57.9	3.1	5%	2%
OTHER	218.6	13.3	6%	10%
TV Advertisers				
PROCTER&GAMBLE	36.0	34.9	97%	27%
UNILEVER	14.5	13.0	90%	10%
BENCKISER	3.1	3.1	100%	2%
COCA-COLA	3.6	3.1	84%	2%
WRIGLEY'S	3.1	2.9	92%	2%
DANDY	2.9	2.6	91%	2%
L'OREAL	4.5	2.4	54%	2%
HENKEL	2.3	2.1	92%	2%
MASTERFOODS	2.5	2.1	81%	2%
FERRERO	1.5	1.5	100%	1%
OTHER	564.5	62.6	11%	48%
Total (in million EEK)	638.6	130.2	20.4%	100.0%
Total (in million EUR)	40.8	8.3	20.4%	100.0%

Source: BMF Gallup Media; Advertising Expenditure Survey

*Press, TV, radio, outdoor and internet

Hungary

1999 was without a doubt the year of the national terrestrial commercial TV channels – these being TV2 (main shareholder: SBS) and RTL Klub (main shareholder: CLT-Ufa). Not only the cable and satellite channels had to give up the race but also the state national channels which held a monopolistic position up until October 1997.

The viewing share of the two public service TV channels – the terrestrial MTV1 (now called m1) and the satellite channel that mainly broadcast cultural programmes called MTV2 (now named m2) – fell by almost half in one year. The decrease of m1's viewing share seemed to stop by the end of the year but its audience base is still made up of the older population and the highly educated people. Duna TV, the 3rd public service channel is operating independently from MTV. Although it is a marginal channel, it is trying to complete regional cultural tasks, and has been rewarded for this by UNESCO which gave the channel the World's Best Cultural Channel award in 1999.

The other loser of the year were the satellite commercial channels Szív TV and Msat (owned by the American HBCO). Despite the fact that the programme structure had been changed a year before – Szív TV showed mainly films and movies and Msat transmitted cartoons all day – they could not turn the channel to be profitable. Both channels stopped operation in 1999 after facing huge debts.

SBS bought up TV3 in February 2000 (half of the film package was immediately sold to RTL Klub) and the day following the transaction the channel stopped transmitting.

The year 1999 showed us that small channels, even if they are thematic ones, cannot survive when competing with the programming and prices generated by the two big commercial channels. TV2 and RTL Klub together owned more than 2/3 of total viewing time and this is more than they could bargain for at the time of their launch. TV2 positioned its channel for the 18+ population. They quickly gained a leading position for this audience and have since kept the top position. RTL Klub wanted to attract 18-49 year olds and despite difficulties at the beginning managed to do so by 1999. But competition is still strong: TV2 would like to have a younger audience as well as keeping its leading position with 18+ while RTL Klub would like to strengthen its position in the 18-49 group by obtaining the leadership in the narrower 40-49 audience.

Due to the aforementioned situation, the programme structures of the two channels are constantly changing and there are often too many programmes of the same genre. When a channel launches a programme which proves to be successful, the other channels tend to be quick to introduce the same format. If a new programme is not that popular after 2-3 transmissions, it is often rescheduled to another time of day or simply cancelled. There were two main tendencies in the Hungarian TV market in 1999. The first was the incredible popularity of South America soap operas. The second, perhaps surpri-

sing tendency is that "home-made" prime time programmes were more popular than the various series from abroad. The most popular prime time programmes are the comedy shows, talk shows and quiz shows either in own format or licensed ones. The new American super productions did not get to the peak of the 18+ top lists because of their younger viewing composition. There were not many sport programmes on the commercial channels in 1999 except the professional boxing matches of István Kovács on RTL Klub.

The two main commercial channels, accounted for roughly 85% of advertising expenditure. Parallel with this, the competition for advertisers resulted in such huge price decreases that it led to the closing down of smaller channels. For the time being, programmes that concentrate on narrow audiences are taken out of the programme structure of the commercial channels. The low prices and relatively small size of the Hungarian TV market make market segmentation impossible.

It is characteristic that among TV channels that transmit for a smaller audience, only HBO with its 277.000 subscribers could survive as it is less dependant on advertisers.

According to the gross figure proportions for TV, the total advertising market did not change much in 1999. However, more and more advertisers promote more and more products on TV because of the relatively low prices. The biggest increase took place within the telecommunication area especially at the end of the year when the fourth mobile telephone provider entered the market.

The backbone of the advertising market is still formed by the big multinational advertisers. Most of the buying went through the big media buying agencies which have become more concentrated both in Hungary and on an international level over the last year. Parallel with the competition of the TV channels, the selling of airtime is more and more viewing based. As a reaction to the increased demand, AGB Hungary (people-meter based viewing provider) raised its panel sample number to 2 200 from the previous 1 600 in April 1999.

Digital TV is still in its infancy in Hungary but if the necessary conditions become available then a similarly fast development can be expected as happened in the Internet sector.

Hungary

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General Data

COUNTRY		ECONOMICS	
Land area (km²)	93 030	GDP in million HUF (at current prices)	11 500 000
Total population	10 044 000	GDP per capita in HUF (at current prices)	1 145 000
Number of households	3 869 480	Inflation rate in 1999 (in %)	10.0
Average household size	2.6	Value of HUF in Euro (EUR)*	1 EUR = 257 HUF
In % of households/population equipped		Value of HUF in US-Dollar (USD)*	1 USD = 266 HUF
Phone	74.0/75.0	Sources: KSH-Central Statistic Office, AGB Establishment Survey, GfK Hungária *Average rate 1999	
Mobile telephone subscribers	n.a./17.0		
PCs	9.0/19.0		
Internet access	n.a./n.a.		
Internet user	n.a./8.1		

TV OVERVIEW	
Total number of TV households (TVHH)	3 693 782
In % of all households	95.5%
Numbers of channels received by 70% of the population	3
TV License-Fee cost per year	HUF 15 360.-/EUR 59.80

TV EQUIPMENT		TV DISTRIBUTION	
		in % of TVHH	
Colour TV	89.3	Cable	passed n.a.
Multiset (homes with more than 1 TV set)	20.4		connected 49.5
VCR	40.5	Satellite	private dish/DTH* 10.8
Teletext	29.9		collective dish/SMATV n.a.
Remote control	75.6	Terrestrial	analog 35.0
Source: AGB Hungary, Establishment Survey 1999			digital 0.0
			MMDS 7.3
		*figure includes collective dish/SMATV	

TV SUBSCRIPTION			
Analog pay TV subscribers	277 000	Digital TV subscribers	n.a.
Sources: AGB Hungary, ES 1999			

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
MTV 1	1957	T, C	98.2%	Hungarian	135	Generalist	L-F, Adv., Gvt.	In-house
MTV 2	1988	S, C, T*	57.0%	Hungarian	110	Generalist	L-F, Adv., Gvt.	In-house
DUNA TV	1992	S, C, T*	56.1%	Hungarian	140	Generalist	L-F, Adv., Gvt.	In-house
Source: BMF Gallup Media, broadcasters								*MMDS

DOMESTIC CHANNELS (NATIONAL PRIVATE)

Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
TV 2	1997	T, C	92.7%	Hungarian	135	Generalist	Adv.	In-house
RTL KLUB	1997	T, C	89.3%	Hungarian	135	Generalist	Adv.	In-house
TV3**	1996	C, T*	45.7%	Hungarian	130	Generalist	Adv.	In-house
Z+	1997	C	20.0%	Hungarian	130	Music	Adv.	In-house
MSAT***	1996	C, S, T*	38.1%	Hungarian	168	Generalist, Music	Adv.	In-house
SZÍV TV***	1993	C, S, T*	35.6%	Hungarian	168	Children, Music	Adv.	In-house
BP TV	1997	C, T*	11.9%	Hungarian	50	Generalist	Adv.	In-house
ATV	1996	C, T*	7.4%	Hungarian	40	Generalist	Adv.	In-house
SPECTRUM TV	1996	C	26.7%	Hungarian	130	Documentaries	Adv.	In-house

Source: BMF Gallup Media, broadcasters *MMDS, **End of broadcasting: February 2000, ***End of broadcasting: September 1999

INTERNATIONAL/PAN EUROPEAN CHANNELS

Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
EUROSPORT	Private	C, S	39%	English/Hungarian	Sport	Adv.
TNT/CARTOON	Private	C, S	28%	English/Hungarian	Old Movies/Cartoons	Adv.
TV5	Private	C, S, T*	22%	French	Generalist	L-F, Spon.
CNN (INT)	Private	C, S	20%	English	News	Adv.
3 SAT	Public	C, S	15%	German	Generalist	L-F
MTV EUROPE	Private	C, S	14%	English	Music	Adv.
NAT. GEOGRAPHIC	Private	C, S	11%	English	Documentaries	Adv.
DEUTSCHE WELLE	Public	C, S, T*	10%	German/sub.	Generalist	L-F
BBC WORLD	Private	C, S	10%	English	News	Adv.
TVE	Public	C, S	10%	Spanish	Generalist	L-F, Adv.
DISCOVERY	Private	C, S	9%	English	Documentaries	Adv.

Source: AGB Hungary, ES 1999 *MMDS

OTHER FOREIGN CHANNELS

Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
RTL	Private	S, C, T*	37.0%	German	Generalist	Adv.
PRO 7	Private	S, C, T*	37.0%	German	Generalist	Adv.
SAT 1	Private	S, C, T*	36.0%	German	Generalist	Adv.
RTL 2	Private	S, C, T*	31.0%	German	Generalist	Adv.
VOX	Private	S, C, T*	27.0%	German	Generalist	Adv.
VIVA	Private	S, C, T*	26.0%	German	Music	Adv.
ORF 1	Public	S, C	17.0%	German	Generalist	L-F, Adv.
RAI UNO	Public	S, C	16.0%	Italian	Generalist	L-F, Adv.
SUPER RTL	Private	S, C	12.0%	German	Generalist	Adv.

Source: AGB Hungary, ES 1999 *MMDS

PAY TV (ANALOG)

Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
HBO	1995	C	277 264	Hungarian	168	Movie	HUF 2 000–4 000	Sub., Adv.	In-house

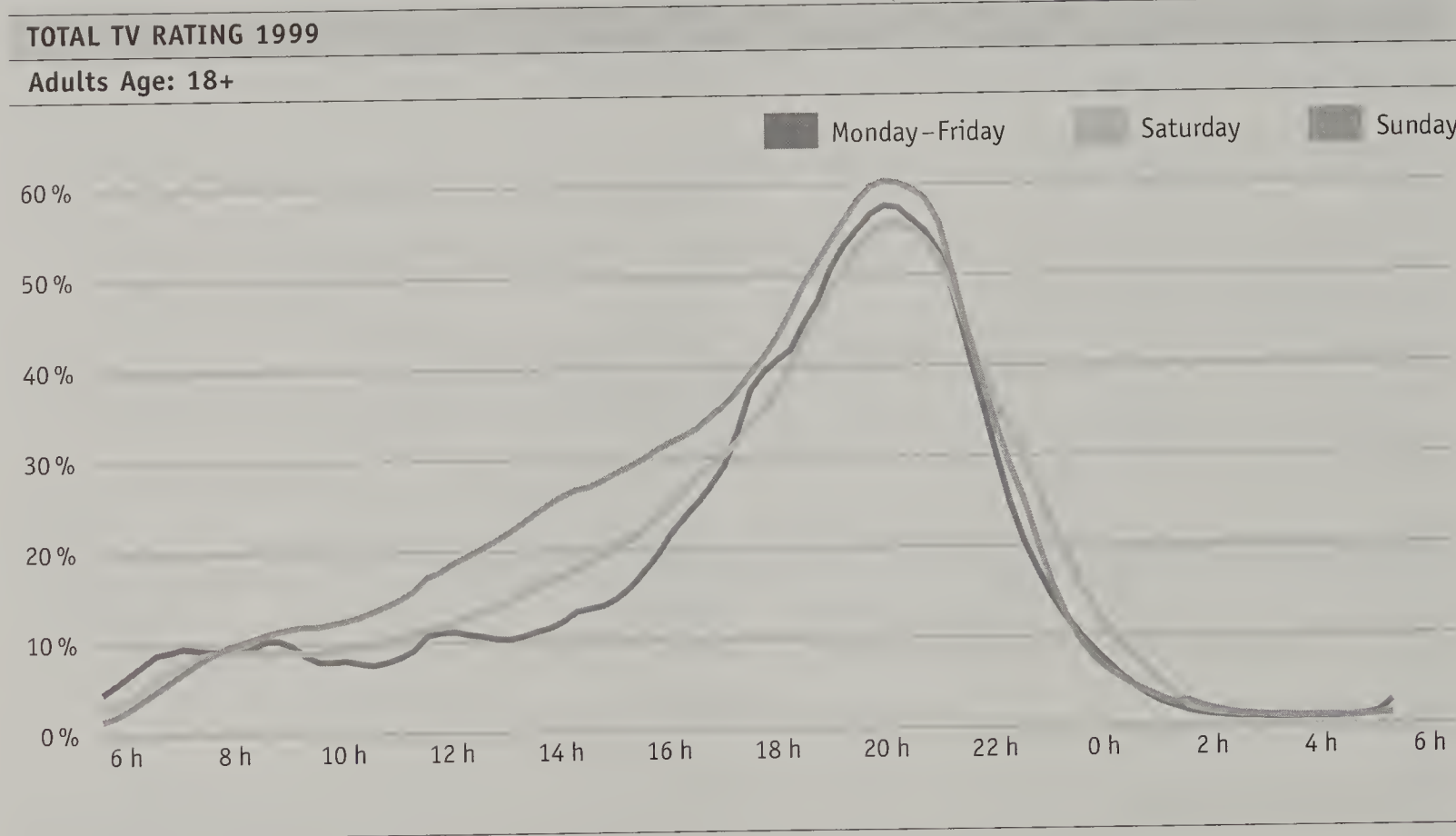
Source: AGB Hungary, ES 1999

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	AGB Hungary	
Panel/Sampling Size	840 households/2 200 individuals*	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	9 235	
Adults 18+	7 543	
Housewives	3 694	
Young Adults 18-49	4 514	
Children 4-12	1 070	

Source: AGB Hungary

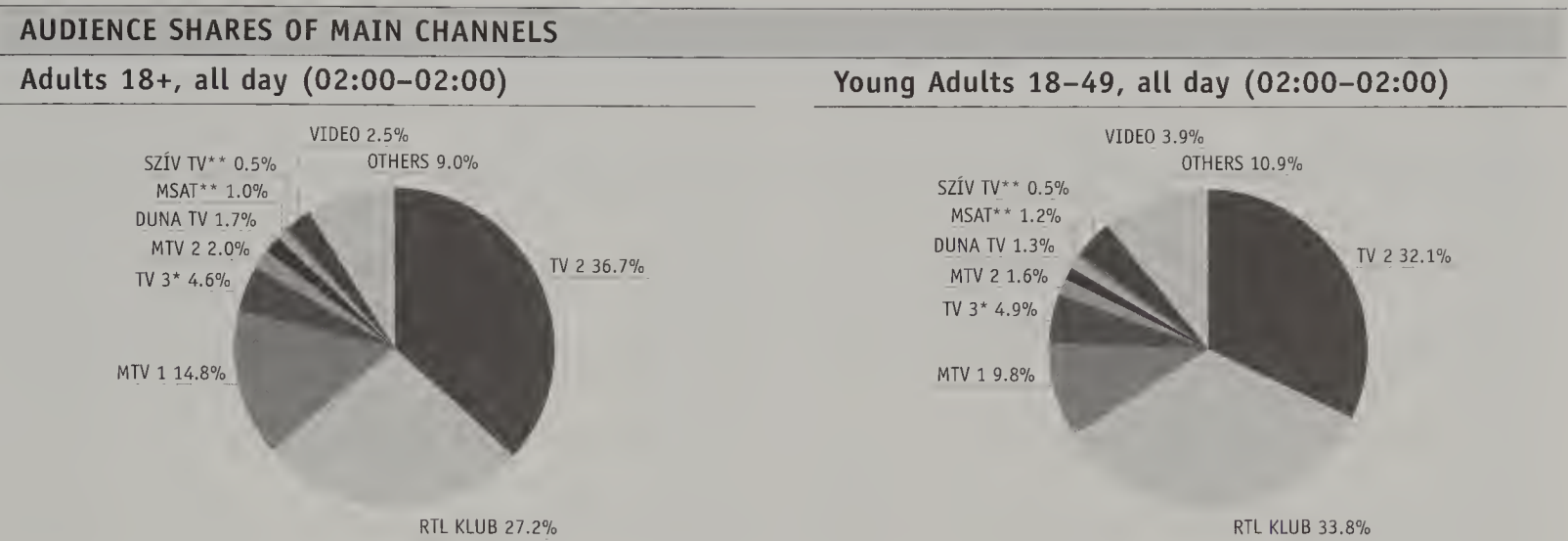
*620 households/1 600 individuals before 12 april 1999



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 18+			Children 4-12			Young Adults 18-49			Housewives		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	80.0	80.0	80.0	74.0	75.0	74.0	75.0	76.0	76.0	86.0	86.0	86.0
Viewing time per Viewer	293	307	314	221	245	250	278	286	290	307	327	334
Viewing time per Individual	235	246	252	165	185	188	208	218	220	266	282	288

Source: AGB Hungary

Audience Shares



*End of broadcasting: February 2000; **End of broadcasting: September 1999

AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00–02:00								
	Adults 18+		Young Adults 18–49		Children 4–12		Housewives	
	1998	1999	1998	1999	1998	1999	1998	1999
TV2	31.2%	36.7%	29.5%	32.1%	22.5%	25.8%	31.2%	37.4%
RTL KLUB	21.1%	27.2%	26.8%	33.8%	39.2%	43.1%	20.5%	26.4%
MTV 1	24.4%	14.8%	17.3%	9.8%	11.3%	5.2%	26.4%	15.6%
TV 3*	3.0%	4.6%	3.4%	4.9%	2.4%	2.5%	2.9%	4.6%
MTV 2	3.1%	2.0%	2.3%	1.6%	1.3%	1.3%	3.4%	2.2%
DUNA TV	2.0%	1.7%	1.7%	1.3%	1.3%	1.0%	2.1%	1.9%
MSAT**	1.7%	1.0%	2.0%	1.2%	2.0%	3.5%	1.5%	0.9%
SZÍV TV**	1.1%	0.5%	1.2%	0.5%	0.9%	0.4%	1.0%	0.6%
VIDEO	2.9%	2.5%	4.7%	3.9%	6.3%	6.9%	2.3%	2.1%
OTHERS	9.3%	9.0%	11.2%	10.9%	13.0%	10.4%	8.7%	8.1%

Source: AGB Hungary

*End of broadcasting: February 2000, **End of broadcasting: September 1999

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 18+		Young Adults 18–49		Children 4–12		Housewives	
	Day Time Prime Time		Day Time Prime Time		Day Time Prime Time		Day Time Prime Time	
	6–19 h	19–22 h	6–19 h	19–22 h	6–19 h	19–22 h	6–19 h	19–22 h
TV2	35.2%	40.2%	30.0%	35.5%	23.0%	32.1%	36.4%	40.6%
RTL KLUB	26.3%	28.0%	32.9%	35.8%	43.6%	42.3%	25.7%	26.8%
MTV 1	15.0%	16.6%	10.6%	10.6%	4.5%	7.1%	15.6%	17.8%
TV 3*	5.3%	3.6%	4.8%	4.8%	2.0%	3.5%	5.5%	3.4%
MTV 2	2.4%	1.6%	1.7%	1.4%	1.1%	2.0%	2.5%	1.7%
DUNA TV	2.2%	1.0%	1.7%	0.7%	1.3%	0.4%	2.4%	1.1%
MSAT**	0.9%	0.8%	1.2%	0.8%	4.7%	0.7%	0.8%	0.7%
SZÍV TV**	0.4%	0.6%	0.4%	0.6%	0.3%	0.5%	0.4%	0.7%
VIDEO	3.1%	1.6%	5.0%	2.6%	8.2%	4.0%	2.5%	1.4%
OTHERS	9.2%	6.0%	11.6%	7.1%	11.5%	7.6%	8.2%	5.7%

Source: AGB Hungary

*End of broadcasting: February 2000, **End of broadcasting: September 1999

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
DÁRIÓ WITH LAJCSI	Hungary	TV 2	Music	21:03	05/02	40.2%	64.4%
DÁRIDÓ-CABARET SHOW	Hungary	TV 2	Comedy Show	20:01	12/11	39.5%	63.2%
FIGHT BEFORE CHRISTMAS	Italy	TV 2	Movie	20:01	21/11	37.8%	64.5%
DESERT OF FIRE	Germany/Italy	TV 2	Series-Romantic	20:03	08/11	36.8%	61.9%
WHO AM I?	Hungary	TV 2	Game Show	20:31	15/01	36.7%	58.2%
HOLLYWOOD SQUARES	Hungary	TV 2	Game Show	20:32	05/03	36.6%	56.4%
HAPPY NEW YEAR ZSIGA	Hungary	TV 2	Variety Show	20:02	29/01	34.5%	53.6%
HOT CLUE	Hungary	TV 2	Magazine-Crimin.	20:03	09/11	33.7%	54.2%
ESMERALDA	Mexico	RTL Klub	Ser.-Daily Soap	19:55	07/07	33.5%	62.5%
HELICOPS	Germany	TV 2	Series-Action	20:46	18/02	33.2%	60.2%
PIEDONE IN HONG KONG	Italy	TV 2	Movie	20:02	09/05	32.7%	57.4%
ANOTHER 48 HOURS	USA	TV 2	Movie	20:01	14/03	32.7%	54.2%
SANDOKAN RETURNS	Italy	TV 2	Series-Romantic	20:00	02/04	32.4%	57.0%
DÁRIDÓ-BIRTHDAY	Hungary	TV 2	Variety Show	21:05	08/10	32.3%	59.4%
ROSALINDA	Mexico	TV 2	Ser.-Daily Soap	19:38	16/12	32.3%	53.8%
FACTS	Hungary	TV 2	News	19:00	02/03	32.0%	61.7%
TALES OF THE SOUTH SEAS	France	TV 2	Series-Romantic	20:03	22/11	32.0%	56.4%
KOMISSAR REX	Germany/Austria	TV 2	Series-Action	20:55	06/10	31.7%	53.3%
AMAZING AND ENTERTAINING	Hungary	RTL Klub	Talk Show	20:05	11/01	31.6%	54.8%
WHEEL OF FORTUNE	Hungary	TV 2	Game Show	19:28	15/03	31.4%	49.8%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
FIGHT BEFORE CHRISTMAS	Italy	TV 2	20:01	21/11	37.8%	64.5%
PIEDONE IN HONG KONG	Italy	TV 2	20:02	09/05	32.7%	57.4%
ANOTHER 48 HOURS	USA	TV 2	20:01	14/03	32.7%	54.2%
48 HOURS	USA	TV 2	20:00	07/03	31.2%	49.8%
PIEDONE L'AFRICANO	Italy	TV 2	20:05	13/11	30.9%	51.9%
FORCE 10 FROM NAVARRONE	USA	TV 2	20:06	14/02	30.5%	47.9%
PIEDONE IL SPIRRO	Italy	TV 2	19:59	25/04	30.2%	48.4%
I QUATTRO DELL' AVE MARIA	Italy	TV 2	20:00	01/01	29.7%	48.8%
SHE'S HAVING A BABY	USA	TV 2	20:00	07/02	29.3%	48.2%
YOUTH OF A QUEEN	Germany	TV 2	20:00	23/12	28.8%	49.7%

TOP 10 SPORT EVENTS						
Title	Channel	Start.Time	Date	Audience	Share	
BOXING KOVÁCS I.-N. DRAMANE	RTL Klub	23:06	22/05	28.2%	73.0%	
BOXING J.R.M.-PADILLA-B.SCHENK	RTL Klub	21:47	22/05	25.7%	52.7%	
BOXING T.LAROSA-W. KLITSHKO	RTL Klub	21:15	22/05	21.9%	38.1%	
BOXING KOVÁCS I.-M. GOMES	RTL Klub	22:13	13/03	21.6%	54.8%	
BOXING KOVÁCS I.-E. MAKIZA SITA	RTL Klub	22:08	25/09	17.8%	41.6%	
BOXING KOVÁCS I.-K. QUASY	RTL Klub	21:51	28/08	17.1%	39.3%	
BOXING KOVÁCS I.-M.N. CABELLO	RTL Klub	22:12	20/02	17.1%	38.3%	
BOXING KOVÁCS I.-A. TIRANOV	RTL Klub	22:30	30/01	15.6%	37.4%	
FBAL HUNGARY-ENGLAND	MTV 1	19:56	28/04	15.4%	29.2%	
FBAL ROMANIA-HUNGARY	MTV 1	19:48	05/06	14.7%	30.6%	

Source: AGB Hungary

Top Programmes Channel by Channel

TV2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
DÁRIDÓ WITH LAJCSI	Hungary	Music	30	21:00	53	30.4%	54.5%
SANDOKAN RETURNS	Italy	Series–Romantic	4	20:10	92	29.0%	51.4%
WHO AM I?	Hungary	Game Show	31	20:35	24	28.7%	48.6%
ROSALINDA	Mexico	Ser.–Daily Soap	54	19:35	24	28.5%	49.0%
DÁRIDÓ–CABARET SHOW	Hungary	Comedy Show	30	20:00	27	28.3%	49.8%
FRIDERIKUSZ–SHOW	Hungary	Game Show	8	20:00	101	27.7%	47.5%
REGISTER	Hungary	Magazine–News	4	18:45	41	26.3%	44.2%
KIFUTÓ	Hungary	Game Show	6	21:00	55	25.6%	47.5%
HOT CLUE	Hungary	Magazine–Crimin.	52	20:00	45	25.3%	45.1%
HELICOPS	Germany	Series–Action	13	20:50	46	24.5%	46.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FIGHT BEFORE CHRISTMAS	Italy	Movie	21/11	20:01	98	37.8%	64.5%
DESERT OF FIRE	Germ./Ital.	Ser.–Romantic	08/11	20:03	90	36.8%	61.9%
HAPPY NEW YEAR ZSIGA	Hungary	Variety Show	29/01	20:02	27	34.5%	53.6%
PIEDONE IN HONGKONG	Italy	Movie	09/05	20:02	108	32.7%	57.4%
ANOTHER 48 HOURS	USA	Movie	14/03	20:01	89	32.7%	54.2%
48 HOURS	USA	Movie	07/03	20:00	90	31.2%	49.8%
1999–CABARET SHOW	Hungary	Comedy Show	31/12	21:48	49	31.0%	56.0%
PIEDONE L’ AFRICANO	Italy	Movie	13/11	20:05	107	30.9%	51.9%
TV STARS IN THE RING	Hungary	Comedy Show	31/12	20:26	70	30.8%	53.9%
FORCE 10 FROM NAVARONE	USA	Movie	14/02	20:06	118	30.5%	47.9%

Source: AGB Hungary

RTL KLUB							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
AMAZING AND ENTERTAINING	Hungary	Talk Show	5	20:05	130	29.1%	52.1%
ESMERALDA	Mexico	Ser.–Daily Soap	95	17:57	41	23.6%	61.8%
LA USURPADORA	Mexico	Ser.–Daily Soap	10	20:00	40	23.6%	38.4%
JUST KIDDING SHOW	Hungary	Comedy Show	7	20:45	70	19.6%	37.8%
THE PRIVILEGE OF LOVING	Mexico	Ser.–Daily Soap	22	19:15	41	19.2%	33.3%
THE REPORTER: TAMÁS FREI	Hungary	Magazine	4	20:50	52	19.0%	35.9%
EVENING SHOW WITH F. SÁNDOR	Hungary	Talk Show	11	20:00	72	18.9%	33.3%
E.R.	USA	Series–General	5	20:00	45	18.7%	32.7%
GÁLVÖLGYI SHOW	Hungary	Comedy Show	12	20:00	35	17.9%	34.1%
COURT TV	Hungary	Debate Show	10	20:50	53	17.8%	33.1%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
RAMBO I.	USA	Movie	03/01	20:01	90	28.5%	42.7%
BOXING: KOVÁCS I.–N.DRAMANE		Sport	22/05	23:06	61	28.2%	73.0%
ERASER	USA	Movie	11/04	20:02	105	28.2%	46.2%
ON DEADLY GROUND	USA	Movie	07/11	20:08	93	27.9%	46.2%
LION HEART	USA	Movie	18/04	20:02	101	27.0%	42.0%
101 DALMATIANS	USA	Movie	26/12	19:51	99	26.8%	42.4%
GLIMMER MAN	USA	Movie	12/09	20:04	85	26.7%	46.5%
VIRTUAL WEAPON	Italy/USA	Movie	30/12	19:54	88	26.3%	45.0%
COBRA	USA	Movie	14/11	20:08	79	26.1%	43.6%
BOXING: J.R.M.PADILLA–B.SCHENK		Sport	22/05	21:47	63	25.7%	52.7%

Source: AGB Hungary

MTV1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
E.R.	USA	Series-General	7	20:00	43	23.5%	37.4%
ATROCIOUS	Hungary	Magaz.-Crimin.	21	21:00	30	21.6%	37.2%
EVENING SHOW WITH F. SÁNDOR	Hungary	Talk Show	7	20:00	54	20.5%	33.1%
CAPRICIOUS SEASONS	Hungary	Comedy Show	11	20:00	53	20.0%	36.3%
COUNT OF MONTE CRISTO	Fra./Ital.	Series-General	9	20:00	50	18.9%	31.2%
JEUX SANS FRONTIERS	n.a.	Game Show	8	20:00	83	15.8%	27.1%
NEIGHBOURS	Hungary	Series-General	26	20:00	28	14.8%	26.0%
SATELLIT	Hungary	Comedy Show	11	20:15	36	14.5%	25.8%
CUCUMBER	Hungary	Comedy Show	11	20:15	16	13.2%	24.5%
CABARET SHOW	Hungary	Comedy Show	8	20:35	24	12.7%	21.3%

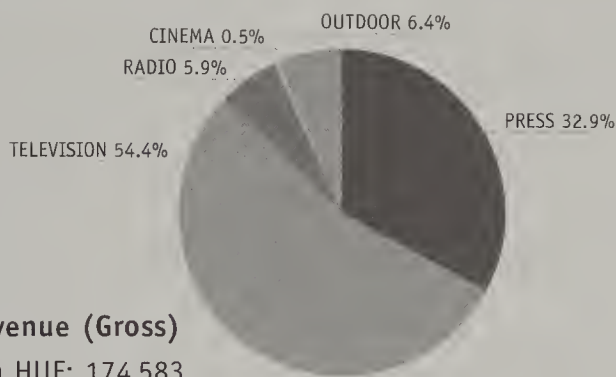
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
SAS JÓZSEF IS 60 YEARS OLD	Hungary	Comedy Show	03/01	20:03	50	21.5%	30.8%
SMILE-COMEDY SHOW	Hungary	Comedy Show	20/03	20:00	52	19.6%	31.9%
FIREWORK	Hungary	Variety Show	20/08	20:57	37	17.9%	35.1%
RENAISSANCE MAN	USA	Movie	02/01	20:02	123	17.4%	29.6%
HOFI GÉZA SHOW	Hungary	Comedy Show	16/05	20:02	43	17.3%	29.2%
DIAMOND RING- SOLAR ECLIPSE	Hungary	Live Broadcast	11/08	11:20	117	17.1%	51.9%
HOFI GÉZA SHOW	Hungary	Comedy Show	24/05	20:01	48	17.1%	29.8%
HOFI GÉZA SHOW	Hungary	Comedy Show	10/05	20:01	72	17.0%	30.1%
ESCAPE FROM PARADISE	Germany	Series-General	07/01	20:01	96	16.6%	27.3%
HOFI GÉZA SHOW	Hungary	Comedy Show	16/04	20:02	56	16.2%	28.8%

Source: AGB Hungary

Advertising Expenditure

ADVERTISING FIGURES		GROSS	NET*
Total adspend	(in million HUF)	174 583	85 000
Total adspend	(in million USD)	656	320
Total adspend	(in million EUR)	679	331
TV adspend	(in million HUF)	94 942	32 000
TV adspend	(in million USD)	357	120
TV adspend	(in million EUR)	369	125
TV adspend	in % of GDP	0.82	0.36
TV adspend	per capita (USD)	36	12

SHARE OF GROSS/NET MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue (Gross)
in million HUF: 174 583
in million EUR: 679

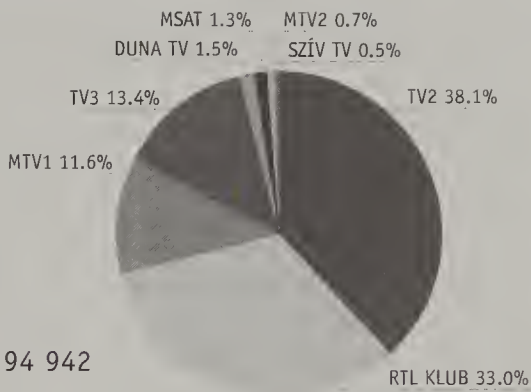
Source: Mediagnózis

TV ADVERTISING STATISTICS	
Total number of spots broadcast	344 912
Average spot length (in sec.)	24.7
Total number of advertisers	9 475
Number of TV advertisers	838
Total number of advertised products	19 388
Number products advertised on TV	2 422

Source: Mediagnózis

*RTL Klub estimation

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



Total Revenue
in million HUF: 94 942
in million EUR: 369

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
FOOD	23 729	19 734	83.2%	20.8%
BEAUTY	19 680	16 877	85.8%	17.8%
DRINK	12 930	10 097	78.1%	10.6%
HOUSEHOLD STORE	9 252	8 813	95.3%	9.3%
PHARMACEUTICAL	8 836	6 251	70.7%	6.6%
INFORMATION/COMMUNICATION	15 724	5 658	36.0%	6.0%
PUBLISHING/MEDIA	10 691	5 086	47.6%	5.4%
BANKING/INSURANCES	10 557	4 339	41.1%	4.6%
CULTURE/LEISURE	8 997	4 091	45.5%	4.3%
TRADE	8 090	3 757	46.4%	4.0%
OTHER	46 098	10 228	22.2%	10.8%
TV Advertisers				
UNILEVER	6 864	6 431	93.7%	6.8%
PROCTER&GAMBLE	5 551	5 320	95.8%	5.6%
HENKEL	3 463	3 175	91.7%	3.3%
MASTER FOODS	2 784	2 657	95.4%	2.8%
NESTLÉ	2 808	2 514	89.5%	2.6%
L'ORÉAL	2 260	2 060	91.2%	2.2%
COCA-COLA	2 427	1 985	81.8%	2.1%
PANNON GSM	4 076	1 885	46.2%	2.0%
PEPSI COLA	2 157	1 721	79.8%	1.8%
BENCKISER	1 772	1 715	96.8%	1.8%
OTHER	140 422	65 479	46.6%	69.0%
Total (in million HUF)	174 584	94 942	54.4%	100.0%
Total (in million EUR)	679	369	54.4%	100.0%

Source: Mediagnózis

Latvia

Last year was quite unfavourable for all Latvian television broadcasters as the whole advertising market in Latvia was badly affected by the Russian financial crisis. Many international advertisers decided to reduce their advertising budgets in the Baltic countries. As a result, the Latvian TV advertising market decreased by 13% in 1999. In the first half of 2000, the market was slowly beginning to stabilize at the level of the year 1998.

At first glance, it would seem that no great changes had occurred during the second half of 1999 up to May 2000. The market continues to be dominated by LNT and LTV1 (holding respectively 26% and 15% of viewers). Latvian Public TV (LTV) with its two channels broadcast on average 21 hours daily, the most powerful private broadcaster – LNT – 18–19 h daily. The relative newcomer – TV3 Latvia, of the Kinnevik chain, has reached higher ratings and in 2000 for some programmes it has seen increases up to 8%–10%. TV3 plans to widen its technical penetration in September 2000 when the total number of viewers is expected to grow to approximately 1.5 million people.

The dominant LNT and LTV gained new vigour, created and localized new games and game shows, had been working more thoroughly on the programme broadcast schedule and have become more flexible in adapting to the changing competitive situation. Brief news and the main news bulletins on LTV and LNT are very popular and they each have developed their own identity, style and character. The main news bulletin Panorama with a rating of 15% is still the leader in this programme genre. It is possible to watch both LTV and LNT news via Internet.

In 1999 a new Baltic network consortium was created. LNT in Latvia, Baltijos TV in Lithuania and TV1 in Estonia are cooperating in advertising sales and programme acquisition.

One of the main discussed issues in 2000 was the scarce state budget allocations for LTV. In 2000, the LTV state subsidy is 4 million Latvian Lats (approx. 6.73 million USD), but in reality in order to survive, the public broadcaster needs about 16.32 million USD. The idea of the introduction of public radio and TV licence fees is still under discussion.

Despite these painful problems, the Latvian TV programme schedule is full of good rating programmes, as the invincible Komissar Rex (rating 16.8%) and main news bulletin Panorama (15%) with its sections, as well as the third year running unfading game show What's My Line? (10.7%). It should be noted that the top-rated programmes are mainly Latvian TV own or local productions.

In 1999, LNT attracted its fans with such inevitably present Latin-American telenovellas as Esmeralda (23%), Milady (14.9%), The Right To Love (14.6%), and internationally acclaimed US productions, such as Walker Texas Ranger (15.0%); Renegade 2 (9.5%), La Femme Nikita (9.3%). The localised LNT, Platform Film Studio and

Pearson TV coproduction – sitcom Sweetheart Monica is highly appraised by the viewers winning 11.9% of audience share. Among the single top ten LNT programmes there are only American blockbuster movies.

LTV's own productions comprise 43% of total programme volume. Productions of independent producers and coproductions: 16%, adaptations (movies, series etc.) 32%, advertising 3% and promotion 6%. LNT's own produced programmes comprise 31% of the whole broadcasting volume, acquired production accounts for 69%.

TV3 Latvia is concentrating on internationally more diverse programming, but the Mexican telenovella Maria Isabella was still the most viewed programme of this channel (6.3%). There are always one or more Russian detective or crime series in the schedule – Streets Of Broken Lanterns winning 4.4%. US movies such as Junior, Twins and Dangerous Cliff 7 were also popular.

Since April 1999, a peplemeter service in Latvia has been provided by Baltic Media Facts – Gallup Media. A nationally representative panel consists of 208 households, which represent 620 individuals above four years of age. The advertising market has access to aggregated minute-by-minute data. Due to this, a greater concentration of TV buying is now observed in the Latvian market because handling peplemeter data requires more investment (both data and software) and strong professional skills.

There is a high level of concentration in the advertising market and the leading advertisers are Procter & Gamble, Unilever and Kraft Jacobs Suchard. The top 10 advertisers account for 43% of expenditure. Cosmetics and personal hygiene and household goods along with food products are leading sectors in TV advertising (52% of expenditure). According to Baltic Media Facts – Gallup Media, the net advertising market amounted to 48.3 million USD in 1999 compared to 48 million USD in 1998. Television investments in total account for 26.5% of the net advertising cake, while Press had a 38% share. Directories, Radio and Outdoor have shares of 19%, 12% and 4% respectively. TV advertising revenues are monopolised by the two largest channels. In 1999, the private channel LNT had 64% share of TV advertising revenue and LTV1 19%.

Latvia

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General Data

COUNTRY	
Land area (km ²)	64 589
Total population	2 439 445*
Number of households	1 011 000*
Average household size	2.4
In % of population equipped	
Phone	73.9**
Mobile telephone subscribers	7.0*
PC's	6.6*
Internet access	1.2**
Internet users	6.1**

Sources: *Central Statistical Bureau of Latvia, Statistical Yearbook of Latvia, 1999,
**BMF Gallup Media Target Group Index Survey, 1999

TV OVERVIEW	
Total number of TV households (TVHH)	980 670
In % of all households	97.0
Numbers of channels received by 70% of the population	3
TV License-Fee cost per year	none

TV EQUIPMENT	
	in % of TVHH
Colour TV	84.0
Multiset (homes with more than 1 TV set)	26.0
VCR	35.0
Teletext	11.0
Remote control	56.0

Sources: BMF Gallup Media, Target Group Index Survey, 1999
*Statistical Yearbook 2000 European Audiovisual Observatory

ECONOMICS	
GDP in million LVL (at current prices)	3 774
GDP per capita in LVL (at current prices)	1 541
Inflation rate in 1999 (in %)	3.2
Value of LVL in Euro (EUR)	1 EUR = 0.587 LVL
Value of LVL in US-Dollar (USD)	1 USD = 0.582 LVL

Sources: Central Statistical Bureau of Latvia, Statistical Yearbook of Latvia, 1999

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	44.0
	connected	41.0*
Satellite	private dish/DTH	6.0
	collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	75 000	Digital TV subscribers	n.a.

Sources: BMF Gallup Media, Target Group Index Survey, 1999

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
LTV 1	1954	T	98%	Latvian	90	Generalist	Gvt, Adv.	In-house
LTV 2	1993	T	94%	Latv./ Russian	65	Generalist	Gvt, Adv.	In-house

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
LNT	1996	T	94%	Latv./ Russian	133	Generalist	Adv.	In-house

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TV 3	1998	T	53%	Latv./ Russian	127	Generalist	Adv.	In-house
TV Riga	1996	T	39%	Latv./ Russian	110	Generalsit	Adv.	In-house

Sources: BMF Gallup Media, Target Group Index Survey, May 1999–January 2000

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Sales House
CARTOON NETWORK/TNT	Private	C, S	21%	Engl.	Movie	Adv.
EUROSPORT	Private	C, S	30%	Engl.	Sport	Adv.
MTV	Private	C, S	10%	Engl.	Music	Adv.

Sources: BMF Gallup Media, Target Group Index Survey, May 1999–January 2000

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
ORT	Public	C, S	48%	Russian	Generalist	Gvt, Adv.
RTR	Public	C, S	48%	Russian	Generalist	Gvt, Adv.
NTV	Private	C, S	23%	Russian	Generalist	Adv.
TV 6 MOSKVA	Private	C, S	27%	Russian	Generalist	Adv.
TV CENTRE	Private	C, S	13%	Russian	Generalist	Adv.
PRO 7	Private	C, S	13%	German	Generalist	Adv.
RTL	Private	C, S	13%	German	Generalist	Adv.
RTL 2	Private	C, S	10%	German	Generalist	Adv.
VIVA	Private	C, S	11%	German	Music	Adv.

Sources: BMF Gallup Media, Target Group Index Survey, May 1999–January 2000

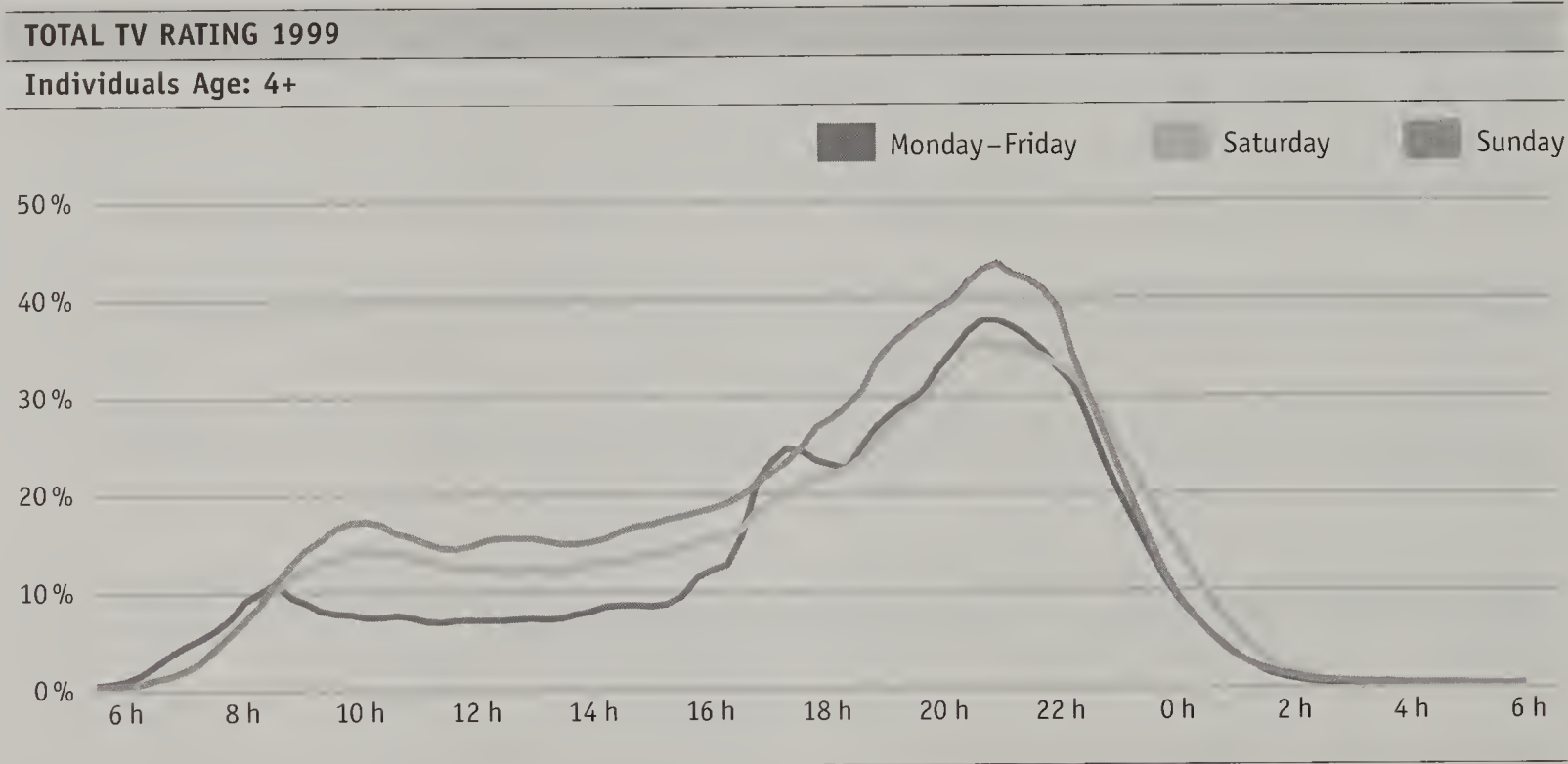
PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Revenue	Sales House
Baltcom	1991	C, S	75.000	Latv.	192	Movie	Sub.	In-house

Sources: BMF Gallup Media, Target Group Index Survey, May 1999–January 2000

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	BMF Gallup Media
Panel/Sampling Size	208 households; 650 persons
Instrument used (people-meter, telefon, face-to-face)	People-meter
Population size in 000	
Individuals 4+	2 362
Adults 12+	2 103
Young Adults 12–34	799
Children 4–12	298

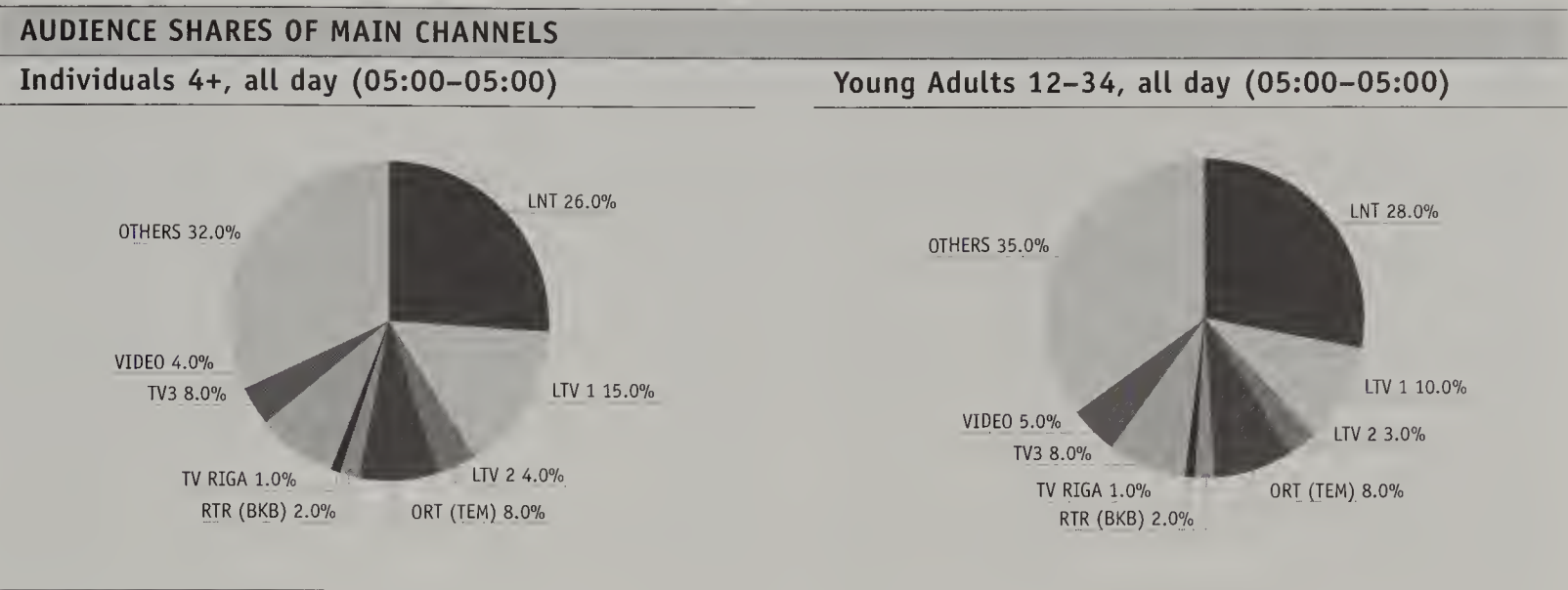
Sources: BMF Gallup Media, TV Meter, April-December, 1999



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)										
	Individuals 4+		Children 4–12		Young adults 12–34		Housewives		Main Purchase Responsibles	
	1998	1999	1998	1999	1998	1999	1998	1999	1998	1999
Daily reach in %	n.a.	70	n.a.	68	n.a.	66	n.a.	67	n.a.	76
Viewing time per Viewer	n.a.	255	n.a.	249	n.a.	248	n.a.	258	n.a.	263
Viewing time per Individual	n.a.	179	n.a.	170	n.a.	165	n.a.	174	n.a.	202

NOTE: Information for 1998 is not comparable due to launching People meter-system in 1999

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 05:00 – 05:00										
	Individuals 4+		Young Adults 12–34		Children 4–12		Main Purchase Responsibles		Housewives	
	1998	1999	1998	1999	1998	1999	1998	1999	1998	1999
LNT	n.a.	26%	n.a.	28%	n.a.	30%	n.a.	27%	n.a.	32%
LTV 1	n.a.	15%	n.a.	10%	n.a.	11%	n.a.	17%	n.a.	18%
LTV 2	n.a.	4%	n.a.	3%	n.a.	3%	n.a.	5%	n.a.	3%
ORT (TEM)	n.a.	8%	n.a.	8%	n.a.	5%	n.a.	9%	n.a.	8%
RTR (BKB)	n.a.	2%	n.a.	2%	n.a.	2%	n.a.	2%	n.a.	1%
TV RIGA	n.a.	1%	n.a.	1%	n.a.	1%	n.a.	1%	n.a.	1%
TV3	n.a.	8%	n.a.	8%	n.a.	9%	n.a.	7%	n.a.	5%
VIDEO	n.a.	4%	n.a.	5%	n.a.	5%	n.a.	3%	n.a.	3%
OTHER	n.a.	32%	n.a.	35%	n.a.	35%	n.a.	30%	n.a.	29%

NOTE: Information for 1998 is not comparable due to launching People meters in 1999

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS										
	Individuals 4+		Young Adults 12–34		Children 4–12		Main Purchase Responsibles		Housewives	
	D.-Time	Pr.-Time	D.-Time	Pr.-Time	D.-Time	Pr.-Time	D.-Time	Pr.-Time	D.-Time	Pr.-Time
	7–18 h	18–23 h	7–18 h	18–23 h	7–18 h	18–23 h	7–18 h	18–23 h	7–18 h	18–23 h
LNT	29%	25%	29%	27%	33%	27%	31%	25%	39%	29%
LTV 1	11%	19%	8%	13%	9%	14%	13%	21%	15%	22%
LTV 2	2%	5%	1%	5%	1%	5%	2%	6%	1%	4%
ORT (TEM)	8%	9%	7%	8%	4%	6%	9%	9%	7%	8%
RTR (BKB)	2%	2%	2%	2%	2%	1%	2%	2%	0%	0%
TV RIGA	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
TV3	9%	8%	8%	8%	8%	9%	7%	7%	4%	5%
VIDEO	4%	3%	5%	4%	6%	4%	3%	2%	2%	3%
OTHER	36%	28%	38%	32%	38%	32%	34%	26%	30%	28%

Sources: BMF Gallup Media, TV Meter, April–December, 1999

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
ESMERALDA	Mexico	LNT	Daily Soap	17:01	06/04	30.3%	84.0%
HAPPY NEW YEAR!	Latvia	LTV 1	n.a.	00:00	31/12	24.5%	52.0%
PRESIDENT'S*	Latvia	LTV 1	Parliam.broadc.**	00:10	31/12	23.0%	49.2%
THE RIGHT TO LOVE	Mexico	LNT	Daily Soap	17:00	04/11	22.9%	68.2%
PRIME MINISTER'S*	Latvia	LTV 1	Parliam.broadc.**	23:47	31/12	21.8%	45.7%
WALKER. TEXAS RANGER	USA	LNT	Series	19:02	11/04	21.6%	51.7%
NIGHT OF THE RUNNING MAN	USA	LNT	Movie	21:10	30/04	21.4%	52.3%
PANORAMA. FIREWORKS.	Latvia	LTV 1	Newscast	20:40	18/11	20.1%	46.1%
REDEMPTION	USA	LNT	Movie	21:13	07/05	19.8%	52.9%
KOMISSAR REX	Germany	LTV 1	Series-Crime	21:25	17/10	19.8%	42.0%
RUMBLE IN THE BRONX	USA	LNT	Movie	21:13	16/04	19.3%	56.7%
PANORAMA	Latvia	LTV 1	Newscast	20:30	13/12	18.8%	37.2%
MILADY	Argentina	LNT	Daily Soap	17:00	05/11	18.7%	61.0%
PANORAMA	Latvia	LTV 1	Newscast	20:30	07/04	18.6%	41.7%
PANORAMA (Sundays)	Latvia	LTV 1	Newscast	20:30	05/12	17.8%	34.0%
LNT BRIEF NEWS	Latvia	LNT	Newscast	16:55	26/04	17.5%	79.4%
PANORAMA (Saturdays, Sundays)	Latvia	LTV 1	Newscast	20:30	03/10	17.4%	35.4%
PANORAMA/SPORTS	Latvia	LTV 1	Sport News	20:57	15/12	17.3%	37.1%
COMANDO	USA	LNT	Movie	21:12	25/06	16.9%	46.8%
KUNG FU	USA	LNT	Movie	21:13	02/06	16.5%	46.3%

*NEW YEAR WELCOME SPEECH **PARLIAMENTARY BROADCASTING

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
NIGHT OF THE RUNNING MAN	USA	LNT	21:10	30/04	21.4%	52.0%
REDEMPTION	USA	LNT	21:13	07/05	19.8%	53.0%
RUMBLE IN THE BRONX	USA	LNT	21:13	16/04	19.3%	57.0%
LIVE WIRE	USA	LNT	21:00	17/12	16.9%	40.0%
COMANDO	USA	LNT	21:12	25/06	16.9%	47.0%
ASSASSINS	USA	LNT	21:04	24/09	16.5%	49.0%
KUNG FU	USA	LNT	21:13	02/06	16.5%	46.0%
FEEDBACK	USA	LNT	20:35	05/04	16.0%	36.0%
FROM DUSK TILL DAWN	USA	LNT	21:03	25/08	15.9%	46.0%
IL DESERTO DI FUOCO	Gemany/Italy	LNT	21:00	21/12	15.2%	37.0%

TOP 10 SPORT EVENTS						
Title		Channel	Start. Time	Date	Audience	Share
ICEHOCK W. CHMP		LTV 2	20:45	09/12	13.0%	36.0%
FORMULA-1		LNT	19:50	07/12	9.8%	30.0%
ICEHOCK W. CHMP		LTV 2	20:45	08/09	9.5%	26.0%
FORMULA-1		LNT	20:01	17/11	9.3%	20.0%
ICEHOCK W. CHMP		LTV 2	20:09	01/12	8.9%	20.0%
FORMULA-1		LNT	14:58	05/12	8.6%	40.0%
ICEHOCK W. CHMP		LTV 2	16:45	02/12	8.3%	26.0%
ICEHOCK W. CHMP		LTV 2	14:45	27/03	7.8%	30.0%
FORMULA-1		LNT	08:50	10/02	7.6%	39.0%
FBAL UEFA		LTV 2	21:35	12/12	6.8%	18.0%

Sources: BMF Gallup Media, TV Meter, April-December 1999

Top Programmes Channel by Channel

LNT							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ESMERALDA	Mexico	Daily Soap	16	17:02	45	23.7%	81.0%
WALKER. TEXAS RANGER	USA	Series	39	19:01	45	15.0%	42.9%
MILADY	Argentina	Daily Soap	38	17:00	47	14.9%	51.5%
THE RIGHT TO LOVE	Mexico	Daily Soap	136	17:02	45	14.6%	65.3%
SWEETHEART MONICA	Latvia	Sitcom	7	20:31	26	11.9%	25.1%
PENSACOLA	USA	Series	18	20:59	50	9.5%	23.3%
LNT NEWS/Continuation	Latvia	Newscast	89	20:20	10	9.5%	23.1%
LAUGH AND ROLL	USA	Variety Show	6	17:52	25	9.4%	31.3%
RENAGADE 2	USA	Series	11	21:06	55	9.3%	24.9%
NIKITA	USA	Series	26	22:30	48	9.3%	35.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
RUMBLE IN THE BRONX	USA	Movie	16/04	21:13	110	19.3%	56.7%
LIVE WIRE	USA	Movie	17/12	21:00	95	16.9%	39.5%
COMMANDO	USA	Movie	25/06	21:12	110	16.9%	46.8%
ASSASSINS	USA	Movie	24/09	21:04	127	16.5%	49.2%
KUNG FU	USA	Movie	02/06	21:13	105	16.5%	46.3%
FEEDBACK	USA	Movie	05/04	20:35	110	16.0%	36.0%
SWEETHART MONICA'S NEW YEAR	Latvia	Variety Show	31/12	21:59	65	16.0%	33.2%
FROM DUSK TILL DAWN	USA	Movie	25/08	21:03	110	15.9%	46.0%
THE SPECIALIST	USA	Movie	17/09	21:00	120	15.1%	41.8%
KUNG FU. LEGEND CONTINUES	USA	Movie	09/06	21:14	110	14.7%	43.4%

Sources: BMF Gallup Media, TV Meter, April–December 1999

LTV 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
KOMISSAR REX	Germany	Series	13	21:22	50	16.8%	34.7%
PANORAMA (Sunday)	Latvia	Newscast	12	20:30	45	15.7%	30.5%
PANORAMA–NEWS	Latvia	Newscast	89	20:30	25	15.0%	35.3%
PANORAMA–SPORTS	Latvia	Sport news	88	20:59	5	13.3%	30.5%
PANORAMA (Saturday, Sunday)	Latvia	Newscast	10	20:30	30	12.9%	32.6%
PANORAMA (Saturday)	Latvia	Newscast	12	20:30	30	11.3%	25.2%
PANORAMA–WEATHER FORECAST	Latvia	Weather forec.	88	21:07	2	11.3%	25.8%
PANORAMA	Latvia	Newscast	153	20:30	30	11.2%	33.9%
WHAT'S MY LINE	Latvia	Games	39	19:50	26	10.7%	27.5%
PANORAMA–Our Guest	Latvia	Current Affairs	84	21:10	5	8.3%	19.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
HAPPY NEW YEAR	Latvia	n.a.	31/12	00:00	n.a.	24.5%	52.0%
PRESIDENT'S*	Latvia	Parl.broadc.**	31/12	00:10	10	23.0%	49.2%
PRIME MINISTER'S	Latvia	Parl.broadc.**	31/12	23:47	15	21.8%	45.7%
PANORAMA/FIREWORKS	Latvia	Newscast	18/11	20:40	5	20.1%	46.1%
LIVE TRANMISS. FROM PALESTINE	n.a.	Current–Affairs	31/12	00:23	35	16.8%	36.8%
PRES. ADDRESS TO THE NATION	Latvia	Parl.broadc.**	24/12	21:03	10	15.6%	32.2%
PRES. SOLEMN WELCOME SPEECH	Latvia	Parl.broadc.**	18/11	19:58	30	13.7%	31.7%
REX–EARLY YEARS	Germany	Movie	20/11	21:21	95	12.7%	27.8%
EVENT OF THE CENTURY IN LATVIA	Latvia	n.a.	31/12	23:10	30	12.3%	24.4%
REPORTING FROM RIGA	Latvia	Current Affairs	31/12	22:47	10	11.7%	23.8%

Sources: BMF Gallup Media, TV Meter, April–December 1999

*NEW YEAR WELCOME SPEECH **PARLIAMENTARY BROADCASTING

LTV 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ICEHOCK CHMP	Norway	Sport	10	18:14	180	6.4%	21.2%
ICEHOCK	Latvia	Sport	4	20:25	180	4.3%	18.5%
SHOCKING SHOW	Latvia	Talk/Chat Show	39	21:27	40	4.0%	10.5%
MANY HAPPY RETURNS!	Latvia	Music	39	19:10	1 h	3.8%	13.5%
APARTMENT	Latvia	Series	72	19:14	20	3.6%	10.6%
FBAL UEFA CHMP		Sport	13	22:12	120	3.5%	14.6%
BBAL EU CHMP		Sport	6	18:47	n/a	3.0%	18.5%
BBAL SAPORT CUP		Sport	7	18:46	90	2.9%	9.1%
FBAL EU QUAL GAMES		Sport	5	19:34	120	2.7%	9.2%
NOTE GAMES	Latvia	Game Show	9	19:46	26	2.7%	7.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ICEHOCK CHMP		Sport	12/04	20:09	n.a.	8.9%	19.7%
OUR PRESIDENT	Latvia	Parl.broadc.**	17/06	20:59	36	7.9%	27.4%
FIVE MINUTES BEFORE	Latvia	Sport-Magaz.	06/05	20:41	5	6.2%	15.4%
HAPPY NEW YEAR	Latvia	n.a.	31/12	00:00	15	5.7%	12.1%
PRIME MINISTER'S NEW YEAR SPEECHE		Parl.broadc.**	31/12	23:48	10	5.5%	11.5%
W. CHMP MOTOBYKES&SIDE-CARS		Sport	18/04	21:54	80	5.4%	17.7%
BLUE THUNDER	USA	Movie	13/11	17:26	90	4.2%	12.5%
HAPPY NEW YEAR	Latvia	Music	31/12	17:25	60	4.1%	11.7%
LA FEMME ET LE PANTIN	France	Movie	18/07	21:41	90	4.0%	14.9%
HAPPY NEW YEAR CONCERT	Latvia	Music	31/12	23:15	45	3.9%	7.8%

Sources: BMF Gallup Media, TV Meter, April-December 1999

TV 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MARIA ISABELA	Mexico	Daily Soap	87	20:10	40	6.3%	20.0%
STREETS OF BROKEN STREETLIGHTS	Russia	Series	9	19:57	60	4.4%	9.0%
WATERRATS	Australia	Series	18	19:40	55	4.2%	12.9%
V.I.P.	USA	Series	19	20:58	50	3.8%	9.1%
PEARL	Mexico	Daily Soap	65	20:02	30	3.6%	8.6%
DAILY CRIME INFO	Latvia	Current Affairs	155	20:21	4	3.4%	11.4%
THE AGENT OF NATIONAL SECURITY	Russia	Series	11	19:27	50	3.4%	15.5%
ALARM FOR COBRA 11	Germany	Series	19	20:20	46	3.3%	8.3%
CRIME INFORMATION	Latvia	Current Affairs	62	22:29	60	2.9%	12.0%
ANIMALS ATTACK	USA	n.a.	4	00:24	45	2.8%	28.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
JUNIOR	USA	Movie	11/04	20:30	110	12.8%	27.8%
TWINS	USA	Movie	09/05	20:29	110	8.2%	19.1%
DANGEROUS CLIFF 7	USA	Movie	19/12	21:06	110	8.1%	17.5%
PURE LUCK	USA	Movie	15/04	22:00	95	7.6%	27.4%
OVERBOARD	USA	Movie	28/10	21:54	120	7.3%	28.0%
K-9	USA	Movie	09/12	21:56	110	7.9%	26.1%
BABY BOOM	USA	Movie	06/11	20:58	115	6.1%	15.0%
DOUBLE AGENT	USA	Movie	26/10	20:59	90	6.0%	14.1%
HARD TARGET	USA	Movie	22/05	20:32	105	7.2%	21.6%
MONEY PIT	USA	Movie	22/04	22:02	95	5.8%	26.4%

Sources: BMF Gallup Media, TV Meter, April-December 1999

LTV 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
STREETS OF BROKEN LATERNs	Russia	Series	4	18:46	60	6.4%	17.7%
DORENKO'S PROGRAMME	Russia	Current affairs	15	19:59	60	4.9%	10.4%
AT THE CORNER NEXT*	Russia	Movie	4	18:42	n.a.	4.7%	12.9%
X FILES	USA	Series	29	21:00	49	4.1%	12.7%
FIELD OF WONDERS	Russia	Game Show	41	18:37	55	3.8%	13.7%
CLUB OF THE MERRY AND WITTY	Russia	Variety Show	13	17:17	75	3.5%	14.1%
FBAL EU QUAL. GAMES		Sport	4	20:19	120	3.1%	13.7%
RUSSIAN TRANSIT	n.a.	n.a.	6	18:47	n.a.	3.0%	12.4%
VREMJA	Russia	Newscast	259	20:00	40	2.8%	8.0%
IN THE NAME OF LOVE	Brazil	Daily Soap	130	16:37	60	2.8%	19.9%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
APLENKUMA 2. TUMSAS TERITORIJA	USA	Movie	05/12	21:30	110	9.0%	22.3%
THE FUGITIVE	USA	Movie	25/04	20:38	135	8.3%	19.9%
HARD TARGET	USA	Movie	08/11	20:46	105	8.3%	19.8%
LES COMPERES	France	Movie	30/10	21:23	95	7.4%	18.2%
WHO NEEDS YOU, FOOLS?	Russia	Variety Show	06/11	17:14	55	7.2%	22.0%
ROCK	USA	Movie	12/12	21:46	135	7.2%	22.5%
GOLD GRAMAPHONE CEREMONY	Russia	Variety Show	24/12	20:47	135	7.2%	18.3%
QUEST	USA	Movie	20/06	20:38	100	7.1%	22.0%
BLACK DOG	n.a.	Movie	14/11	18:22	n.a.	7.1%	16.0%
POLICE FAMILY 2	USA/Can.	Movie	13/10	21:05	105	6.9%	18.6%

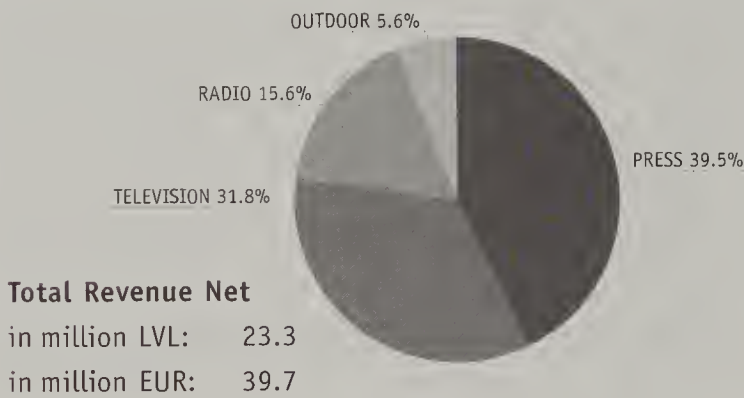
Sources: BMF Gallup Media, TV Meter, April–December 1999

*PATRIARSHYE POUDS

Advertising Expenditure

ADVERTISING FIGURES		NET*
Total adspend	(in million LVL)	23.3
Total adspend	(in million USD)	40
Total adspend	(in million EUR)	39.7
TV adspend	(in million LVL)	7.4
TV adspend	(in million USD)	12.8
TV adspend	(in million EUR)	12.6
TV adspend	in % of GDP	0.2
TV adspend	per capita (USD)	5.2

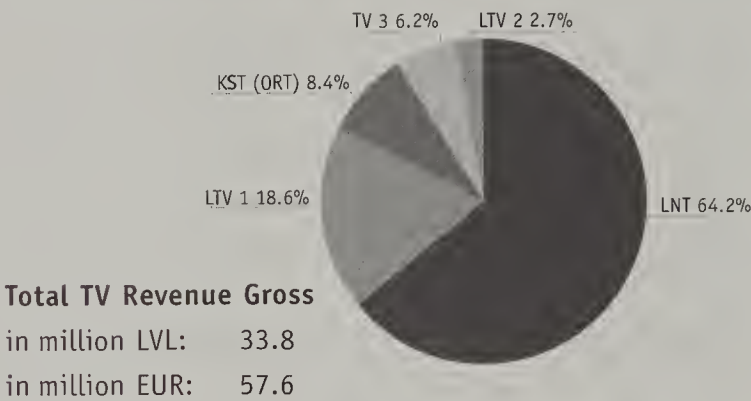
SHARE OF MEDIA EXPENDITURE	NET
Category: Market Share in %	



TV ADVERTISING STATISTICS	
Total number of spots broadcast	168 530
Average spot length (in sec.)	23.2
Total number of advertisers	8 066
Number of TV advertisers	955
Total number of advertised products	7 481
Number products advertised on TV	1 585

Sources: BMF Gallup Media, Advertising Expenditures Survey
*Traditional media (Press, TV, Radio and Outdoor)

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



TOP 10 ADVERTISING FIGURES GROSS				
TV Advertising Sectors	2 Media*	Television	Spent in TV	Share of TV Expenditure
COSMETICS, PERSONAL HYGIENE	8.4	7.4	88.1%	22.1%
HOUSEHOLD GOODS	5.9	5.2	88.1%	15.5%
FOOD PRODUCTS	5.6	5	89.3%	14.9%
ENTERTAINMENT, CULTURE, RECREATION	5.9	4.2	71.2%	12.5%
MEDICINE	2.6	1.9	73.1%	5.7%
NON-ALCOHOLIC BEVERAGES	2.2	1.9	86.4%	5.7%
COMMUNICATION, ELECTRONICS, COMPUTERS	3.4	1.5	44.1%	4.5%
MEDIA, PUBLISHING	2.6	1.2	46.2%	3.6%
CONSTRUCTION, FURNITURE	2.6	0.8	30.8%	2.4%
BUSINESS, FINANCIAL SERVICES, REAL ESTATE	3.7	0.8	21.6%	2.4%
OTHER	9.6	3.9	40.6%	10.7%
TV Advertisers				
PROCTER & GAMBLE	6.6	6.5	98.5%	19.4%
UNILEVER	3.1	2.9	93.5%	8.7%
KRAFT JACOBS SUCHARD	1.2	1.2	100.0%	3.6%
BENCKISER	0.7	0.7	100.0%	2.1%
JOHNSON & JOHNSON	0.7	0.6	85.7%	1.8%
COCA-COLA DZÉRIENI	0.6	0.6	100.0%	1.8%
AVE LAT GRUPA	0.8	0.6	75.0%	1.8%
WRIGLEY	0.5	0.5	100.0%	1.5%
BDG	0.5	0.5	100.0%	1.5%
BALTCOM	0.6	0.4	66.7%	1.2%
OTHER	37.2	19.3	51.9%	56.7%
Total (in million LVL)	52.5	33.8	64.4%	100.0%
Total (in million EUR)	89.5	57.6	64.4%	100.0%

Source: BMF Gallup Media, Advertising Expenditure Survey

*Press and TV

The year 1999 was not the best for the Lithuanian advertising industry. Consequences of the economic crisis included decreased budgets, high discounts and fierce competition for each litas spent. The comparatively low cost per point system made television the most attractive medium for big advertisers and due to this the television market share increased to 50% for the first time in Lithuanian advertising history, leaving press behind with 42%. Radio and outdoor were not able to come closer to the leading sectors of the media market.

A growing professionalism of the media and advertising market, mounting competition between different media and internal competition in separate media sectors forced all players to search for the most tailor-made offers and make very sophisticated budget distributions, meaning a more careful handling of the client's money and making sure budget increases were not necessary. At the moment there are no clear signs of the market growth.

Lithuania has four national television channels for its population of 3.7 million, all with similar audience and non-limited airtime on each of the channels. To reach the target audience, it is, in principal, enough to plan a campaign on two of the leading channels. It is said that in Lithuania, a campaign on three television channels is luxury, on four – a complete waste of money. Clients do understand this and try to get the best value. Net TV advertising revenues are substantially lower than gross figures to account for often high discounts, agency commissions, production costs, etc. Additional discounts are also invented – the channel gives an incentive to the client if its expenditure with the respective channel is considerably higher than with competing channels. Official rate cards are often nice tools for presentation only but are not used for day-to-day sales.

There are, however, some signs that can fuel a little optimism into the media - the structure of television advertisers is changing. Fmcg companies are still huge advertisers, but their share and importance are slowly decreasing. New industries such as telecommunication and dotcom companies are joining the television advertising market. Newcomers have a lot of money to spend and their negotiating skills in the field of discounts compared with the fmcg companies are not as developed.

In Lithuania, television (public and commercial) is a very important medium although the commercial channels exist less than one decade. TV is generally available and free (except cable) and high competition forces TV networks to produce and broadcast popular programs. Lithuania has a tradition of heavy TV consumption – viewing time per viewer in 1999 was 223 minutes, per individual – 191 min. Adults 12-34 years consumed 225 min. and 191 min. respectively.

There were no dramatic changes in television evolution during the last year. TV3 Lithuania holds the leading

position both in audience and market share. LNK is still number two among the TV networks. Baltijos TV finally found a strategic investor – the majority of its shares were acquired by Polsat from neighbour Poland. Baltijos TV invested into a network of privately owned transmitters and improved technical coverage, nevertheless for the time being it did not help BTV to interfere with the leaders (TV3 and LNK). The real loser in the competition was Lithuanian State TV. It intends to become public service, but due to the lack of clear legislation, the political and economical environment it is still under the control of the state authorities. Talks about licence fee are being initiated, but even that will hardly help State TV – poor management cannot solve problems, which are very significant in the background of private commercial channels.

The hot issue on the market is the introduction of peoplemeter TV audience measurement. Until now, a diary measurement system has been used in the country and testing of the new system is taking place. It is almost certain that starting from the year 2001, the peoplemeter measurement system will be accepted as a common currency on the TV market by major television broadcasters, media buying agencies and their clients. It is clear that peoplemeters will have an impact on the television advertising society and lead to new demands for all players of the market, but it will only be possible to judge the advantages and disadvantages of the system after its full implementation.

Lithuania

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General Data

COUNTRY	
Land area (km²)	65 300
Total population	3 700 799
Number of households	1 370 667
Average household size	2.7
In % of households equipped	
Phone	71.6
Mobile telephone subscribers	8.8
PCs	6.3
Internet	2.7

Sources: SIC Gallup Media, Omnitel, Penki Kontinentai

ECONOMICS	
GDP in million LTL (at current prices)	42 422*
GDP per capita in LTL (at current prices)	11 500
Inflation rate in 1999 (in %)	0.8*
Value of LTL in Euro (EUR)**	1 EUR = 3.89 LTL
Value of LTL in US-Dollar (USD)**	1 USD = 4.00 LTL

Sources: Ministry of Economy of the Republic of the Lithuania *Forecast, **March 2000

TV OVERVIEW	
Total number of TV households (TVHH)	1 365 184
In % of all households	99.6%
Numbers of channels received by 70% of the population	4
TV License-Fee cost per year	n.a.

Source: SIC Gallup Media

TV EQUIPMENT	
	in % of TVHH
Colour TV	87.9
Multiset (homes with more than 1 TV set)	42.1
VCR	26.7
Teletext	12.9
Remote control	49.3

Sources: SIC Gallup Media, Lithuania Cable Television Association

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	37.4
	connected	16.6
Satellite	Private dish/DTH	2.8
	Collective dish/SMATV	2.2
Terrestrial	analog	75.4
	digital	0.0
	MMDS	3.0

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
LTV	1957	T	98%	Lithuanian	74	Generalist	Gvt., Adv.	In-house

Sources: SIC Gallup Media, LRT

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
TV 3	1992	T	98%	Lithuanian	124	Generalist	Adv.	IP Vilnius
LNK	1995	T	99%	Lithuanian	125	Generalist	Adv.	In-house
Baltijos TV	1993	T	88%	Lith./Germ.	168	Generalist	Adv.	In-house

Sources: SIC Gallup Media; TV 3; LNK; Baltijos TV

DOMESTIC CHANNELS (REGIONAL PRIVATE)									
Channels		Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
11 KANALAS		1996	T	24.9%	Lith/Russ	84	Generalist	Adv.	In-house
VILNIAUS TV		1994	T	22.0%	Lith/Russ	112	Generalist	Adv.	In-house
AR TELEVIZIJA		1998	T	11.5%	Lith/Russ	70	Generalist	Adv.	In-house
KLAIPEDOS TELEVIZIJA		1990	T	11.3%	Lith/Russ	32	Generalist	Adv.	In-house
MIKROVISATOS TV		1997	T	7.3%	multilingual	168	Generalist	n.a.	n.a.
SIAULIU TELEVIZIJA		1992	T	6.8%	Lith/Russ	70	Generalist	Adv.	In-house
VINITA		1993	C	5.7%	multilingual	168	Generalist	Adv.	In-house
BALTICUM TV		1989	C	4.7%	multilingual	168	Generalist	Adv.	In-house
INIT TELEVIZIJA		1996	C	4.6%	multilingual	168	Generalist	Adv.	In-house
PAN TV		1990	T	4.1%	Lith/Russ	140	Generalist	Adv.	In-house
MARIJAMPOLES TELEVIZIJA		1990	T	4.1%	Lith/Russ	49	Generalist	Adv.	In-house
ALYTAUS REGIONINE TELEVIZIJA		1999	T	1.6%	multilingual	168	Generalist	Adv.	In-house
RASEINIU TELEVIZIJOS IR R. C.		1994	T	1.4%	Lith./Ger./Russ.	105	Generalist	Adv.	In-house
RYGVEDA		1994	C	1.3%	multilingual	168	Generalist	Adv.	In-house

Sources: Lithuanian Cable Television Association, TV Stations

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
EUROSPORT	Private	C, S	21.0%	English/Russian	Sport	Adv.
DISCOVERY	Private	C, S	16.1%	English/Russian	Documentaries	Adv.
CARTOON NETWORK	Private	C, S	15.2%	English	Cartoons	Adv.
TRAVEL CHANNEL	Private	C, S	13.3%	English	Documentaries	Adv.
ANIMAL PLANET	Private	C, S	12.8%	English/Russian	Documentaries	Adv.
MTV	Private	C, S	11.2%	English/German	Music	Adv.
CNN INTERNATIONAL	Private	C, S	10.9%	English	News	Adv.
TNT	Private	C, S	10.5%	English	Old Movie	Adv.
TV5	Private	C, S	10.1%	French	Generalist	Adv.
DEUTSCHE WELLE TV	Public	T, C, S	8.2%	German/English	Generalist	L-F
NATIONAL GEOGRAPHIC	Private	C, S	7.4%	English	Documentaries	Adv.
3 SAT	Public	C, S	6.5%	German	Generalist	L-F
EURONEWS	Private	C, S	6.3%	English	News	Adv.
BBC WORLD	Public	C, S	6.0%	English	News	L-F
NBC	Private	C, S	4.8%	English	Generalist	Adv.
CNBC EUROPE	Private	C, S	3.4%	English	Finance	Adv.
BBC PRIME	Public	C, S	2.7%	English	News	Adv.
CMT	Private	C, S	2.6%	English	Music	Adv.

Sources: SIC Gallup Media, IP Vilnius

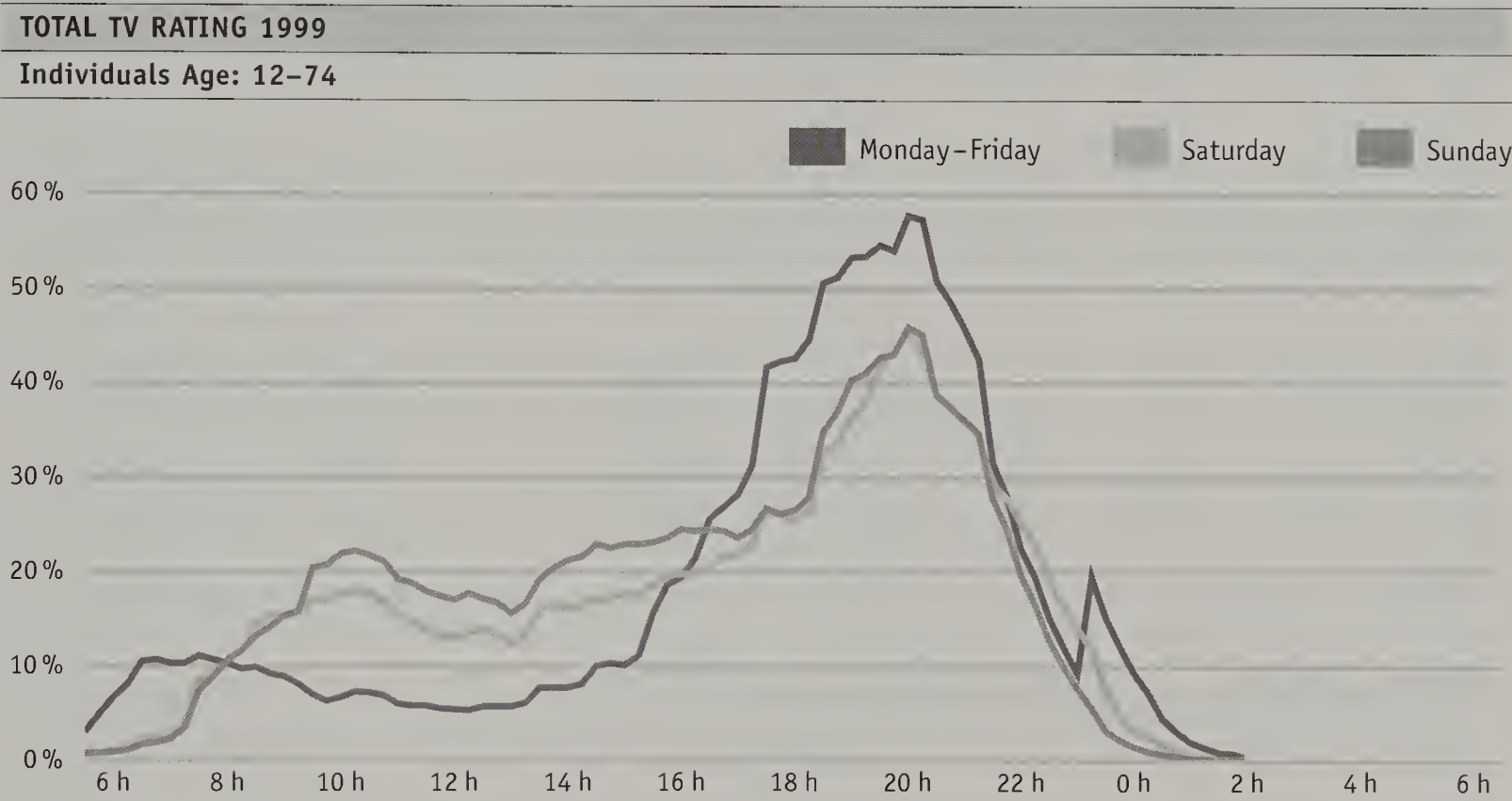
OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
TV 6	Private	T, C, S	35.4%	Russian	Generalist	Adv.
ORT	Public	C, S	34.6%	Russian	Generalist	Adv.
RTR	Public	C, S	27.7%	Russian	Generalist	L-F, Adv.
TV POLONIA	Public	T, C, S	23.3%	Polish	Generalist	L-F, Adv.
NTV	Private	C, S	22.7%	Russian	Generalist	Adv.
VIVA	Private	C, S	17.1%	German	Music	Adv.
POLSAT	Private	C, S	16.3%	Polish	Generalist	Adv.
RTL	Private	C, S	15.1%	German	Generalist	Adv.
SAT 1	Private	C, S	12.1%	German	Generalist	Adv.
RTL II	Private	C, S	11.3%	German	Generalist	Adv.
RTL 7	Private	C, S	11.0%	Polish	Generalist	Adv.
NTV+NASE KINO	Private	C, S	10.3%	Russian	Movie	Adv.
NTV+MIR KINO	Private	C, S	10.3%	Russian	Movie	Adv.
MUZZIC	Private	C, S	8.0%	French	Music	Adv.
DSF	Private	C, S	7.3%	German	Sport	Adv.
TVP 1	Public	T, C, S	6.4%	Polish	Generalist	L-F, Adv.
MCM	Private	C, S	6.1%	French	Music	Adv.
ADULT CHANNEL	Private	C, S	6.0%	English	Adult	Adv.
VOX	Private	C, S	5.8%	German	Generalist	Adv.
TV XXI VEK	Private	C, S	5.2%	Russian	Movie	Adv.
FASHION TV	Private	C, S	5.2%	French	Fashion	Adv.
LNT	Private	T, C	5.0%	Latvian/Russian	Generalist	Adv.
VIVA 2	Private	C, S	3.5%	German	Music	Adv.
SKY NEWS	Private	C, S	2.9%	English	News	Adv.
VH-1	Private	C, S	1.0%	German	Music	Adv.
PRO 7	Private	C, S	15.4%	German	Generalist	Adv.

Sources: SIC Gallup Media, IP Vilnius

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	SIC Gallup Media, 1996	
Panel/Sampling Size	1 700 respondents per month	
Instrument used (people-meter, telefon, face-to-face)	diary	
	Population size in 000	
Individuals 12–74	2 922	
Adults 15–74	2 766	
Young Adults 12–34	1 266	

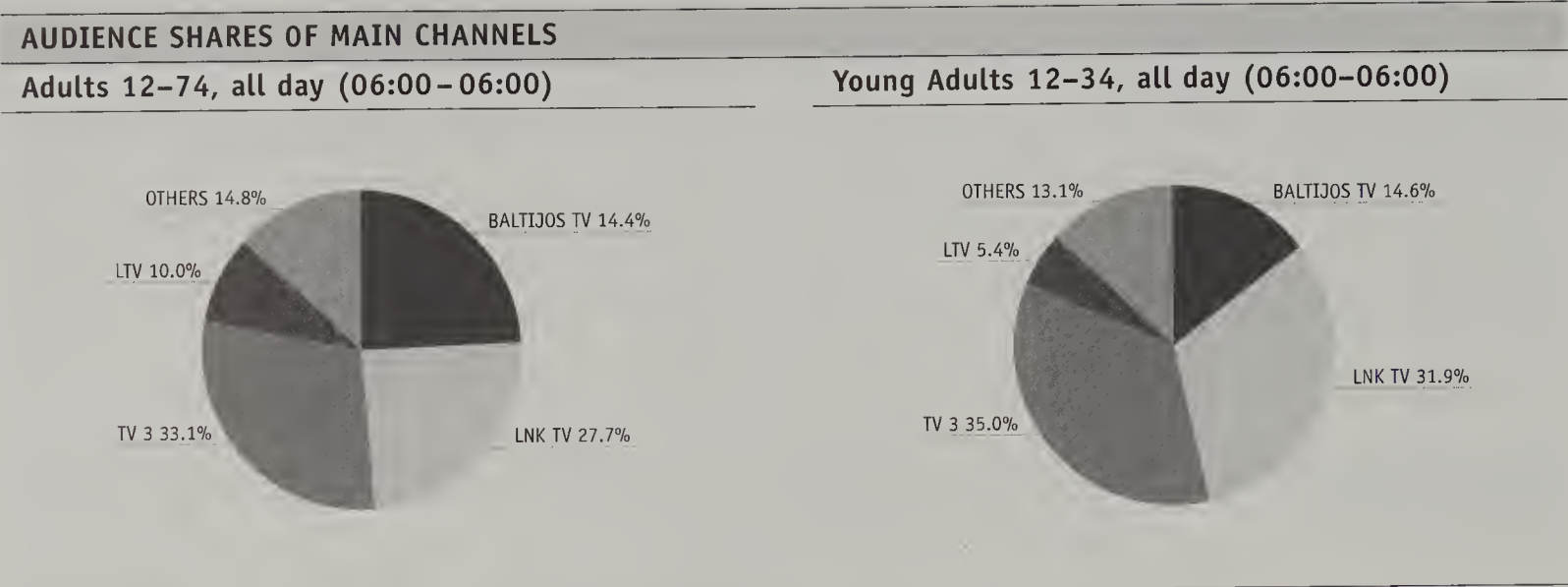
Source: SIC Gallup Media



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)						
	Adults 15–74			Young Adults 12–34		
	1997	1998	1999	1997	1998	1999
Daily reach in %	90.0	87.0	86.0	90.0	86.0	85.0
Viewing time per Viewer	283	205	223	295	211	225
Viewing time per Individual	255	177	191	264	180	191

Source: SIC Gallup Media, viewing time for 1997 (Oct–Dec), 1998–1999 (whole year)

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 06:00-6:00				
	Individuals 12-74		Young Adults 12-34	
	1998	1999	1998	1999
BALTIJOS TV	12.2%	14.4%	14.6%	14.6%
LNK TV	28.0%	27.7%	27.2%	31.9%
TV 3	29.6%	33.1%	38.9%	35.0%
LTV	16.2%	10.0%	8.6%	5.4%
OTHERS	14.0%	14.8%	10.7%	13.1%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS				
	Individuals 12-74		Young Adults 12-34	
	Day Time 6-18 h	Prime Time 18-23 h	Day Time 6-18 h	Prime Time 18-23 h
BALTIJOS TV	12.8%	15.3%	12.3%	14.9%
LNK TV	34.0%	27.0%	37.2%	29.1%
TV 3	29.2%	34.2%	31.6%	39.1%
LTV	9.4%	11.7%	4.9%	5.7%
OTHERS	14.6%	11.8%	14.0%	11.2%

Source: SIC Gallup Media

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
BBAL EU-LEAG ZALGIRIS-KINDER	Lithuanian	TV 3	Sport	20:53	22/04	31.1%	64.4%
BBAL EU-LEAG ZALG.-OLYMPIAK.		TV 3	Sport	20:58	20/04	27.0%	60.7%
BBAL EU-LEAG TEAM SYS.-OLYMP.		TV 3	Sport	18:25	22/04	26.9%	47.8%
FINAL FOR MEN 99 OVERVIEW		TV 3	Sport	20:45	n.a.	25.9%	55.6%
MARIA ISABEL	Mexico	TV 3	Series	18:00	n.a.	25.1%	47.3%
ROCKY III	USA	TV 3	Movie	20:00	19/03	24.9%	41.8%
BBAL EU-LEAG TEAM SYS.-KIND.	USA	TV 3	Sport	18:27	20/04	24.3%	43.6%
BBAL EU-LEAG ZALG.-EFES PILS.		LNK	Sport	20:27	23/03	23.9%	43.1%
BBAL EU-LEAG ZALG.-CRV. ZVEZD.		LNK	Sport	20:28	07/01	23.8%	40.0%
ROCKY IV		TV 3	Movie	20:06	26/03	23.6%	41.0%
BBAL EU-LEAG ZALG.-CRV. ZVEZD.	Lithuanian	LNK	Sport	20:27	04/02	23.5%	43.7%
BBAL EU-LEAG ZALG.-EFES PILS.		LNK	Sport	16:57	25/03	23.5%	53.5%
LOGAN'S WAR: BOUND BY HONOR		TV 3	Movie	20:00	19/11	23.4%	38.8%
SPEECH OF LR PREZID. V. ADAMK.		TV 3	News	20:58	19/04	23.3%	42.9%
ROSALINDA	Mexico	TV 3	Series	18:00	n.a.	23.3%	52.9%
BBAL EU-CHMP LITH.-GERM.	Lithuanian	TV 3	Sport	18:19	22/06	23.2%	48.2%
BBAL ZALGIRIS-VASKO DA GAMA		TV 3	Sport	18:29	15/10	23.1%	43.2%
BBAL EU-LEAG ZALG.-TDK MANR.		LNK	Sport	20:26	11/02	22.7%	44.3%
BBAL EU-LEAG ZALG.-CIBONA		LNK	Sport	20:27	21/01	22.7%	39.5%
BBAL EU-LEAG ZALG.-ULKER	Lithuanian	LNK	Sport	20:29	02/03	22.5%	41.2%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
ROCKY III	USA	TV 3	20:00	19/03	24.9%	41.8%
ROCKY IV	USA	TV 3	20:00	26/03	23.6%	41.0%
LOGAN'S WAR: BOUND BY HONOR	USA	TV 3	20:00	19/11	23.4%	38.8%
BODYGUARD	USA	TV 3	20:00	03/01	21.8%	41.9%
PROBLEM CHILD II	USA	TV 3	16:15	02/01	20.7%	55.4%
ROCKY II	USA	TV 3	20:00	12/03	20.5%	39.9%
ROCKETEER	USA	TV 3	20:00	03/12	20.5%	34.2%
RUTHLESS PEOPLE	USA	TV 3	20:00	09/04	19.7%	35.4%
KUNG FU	USA	TV 3	20:00	13/02	19.7%	39.2%
ROCKY V	USA	TV 3	20:00	02/04	19.2%	36.0%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
BBAL EU-LEAG ZALGIRIS-KINDER		TV 3	20:45	22/04	31.1%	64.4%
BBAL EU-LEAG ZALGIRIS-OLYMPIAKOS		TV 3	21:00	20/04	27.0%	60.7%
BBAL EU-LEAG TEAM SYSTEM-OLYMPIAKOS		TV 3	18:30	22/04	26.9%	47.8%
BBAL EU-LEAG TEAM SYSTEM-KINDER		TV 3	18:30	20/04	24.3%	43.6%
BBAL EU-LEAG ZALGIRIS-EFES PILSEN		LNK	20:30	23/03	23.9%	43.1%
BBAL EU-LEAG ZALGIRIS-CRVENA ZVEZDA		LNK	20:30	07/01	23.8%	40.0%
BBAL EU-LEAG ZALGIRIS-CRVENA ZVEZDA		LNK	20:30	04/02	23.5%	43.7%
BBAL EU-LEAG ZALGIRIS-EFES PILSEN		LNK	17:00	25/03	23.5%	53.5%
BBAL EU-CHMP LITHUANIA-GERMANY		TV 3	18:15	22/06	23.2%	48.2%
BBAL ZALGIRIS-VASKO DA GAMA		TV 3	18:30	15/10	23.1%	43.2%

Source: SIC Gullup Media

Top Programmes Channel by Channel

TV 3							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MARIA ISABEL	Mexico	Ser.–Daily Soap	31	18:00	50	25.1%	47.3%
ROSALINDA	Mexico	Ser.–Daily Soap	80	18:00	50	23.3%	52.9%
ON BOTH SIDES OF THE WALL	Lithuanian	Magazine	25	21:00	30	22.5%	45.4%
WITHOUT TABU	Lithuanian	Reality Show	114	21:30	30	21.2%	37.5%
METROPOLY	Lithuanian	Game Show	50	17:45	10	20.9%	50.6%
THE THIRD MILLENIUM	Lithuanian	Game Show	60	18:45	10	20.7%	41.5%
3X3	Lithuanian	Game Show	41	18:45	5	20.2%	46.8%
LIETUVOS RYTAS TV	Lithuanian	Magazine	49	20:45	50	19.3%	39.6%
MARIA CHOSE	Mexico	Ser.–Daily Soap	69	18:00	50	19.2%	40.8%
MELROSE PLACE	USA	Series–General	51	20:00	55	18.8%	31.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
BBAL EU-LEAG. ZALGIRIS-KINDER	Lithuanian	Sport	22/04	20:53	136	31.1%	64.4%
BBAL EU-LEAG. ZALG.-OLYMPIAKOS		Sport	20/04	20:58	101	27.0%	60.7%
BBAL EU-LEAG. TEAM SYS.-OLYMP.		Sport	22/04	18:25	92	26.9%	47.8%
FINAL FOR MEN 99 OVERVIEW		Sport	n.a.	20:45	5	25.9%	55.6%
BBAL EU-LEAG. TEAM SYS.-KINDER		Sport	20/04	18:27	99	24.3%	43.6%
ROCKY IV	USA	Movie	26/03	20:06	98	23.6%	41.0%
LOGAN’S WAR: BOUND BY HONOR	USA	Movie	19/11	20:03	102	23.4%	38.8%
SPEECH OF LR PREZID. V. ADAMKUS		News	19/04	20:58	10	23.3%	42.9%
BBAL EU CHMP LITHUANIA-GERM.		Sport	22/06	18:19	105	23.2%	48.2%
BBAL ZALGIRIS-VASKO DA GAMA		Sport	15/10	18:29	164	23.1%	43.2%

Source: SIC Gallup Media

BALTIJOS TV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
LA USURPADORA	Mexico	Ser.–Daily Soap	5	19:00	50	17.6%	29.4%
BICYCLE SHOW	Lithuanian	Comedy Show	119	20:00	15	11.6%	22.5%
COFFEE WITH THE TASTE OF A WOM.	Venezuela	Ser.–Daily Soap	158	19:00	60	11.0%	20.4%
I CONTINUE TO LOVE YOU	Mexico	Ser.–Daily Soap	46	18:05	55	9.9%	19.5%
THE BANK	Lithuanian	Magazine	13	21:40	50	9.5%	26.1%
THE PEARL	Lithuanian	Game Show	97	19:55	5	9.0%	16.4%
NEWS 20:00	Lithuanian	News	251	20:00	20	8.2%	15.3%
MY SUMMER TV. OF COURSE BTV	Lithuanian	Game Show	50	19:55	5	8.1%	19.3%
KOMISSAR REX	Germany	Series–Action	49	20:25	55	7.8%	14.2%
ALARM FOR COBRA 11	Germany	Series–Action	27	20:25	50	7.7%	14.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
OSOBIENOSTI NACIONALNOJ OCHOTI	Russia	Movie	21/11	19:58	105	14.2%	28.4%
TERMINATOR	USA	Movie	06/11	20:27	115	13.9%	30.0%
SUPERSINGLE	Germany	Movie	09/12	20:14	101	12.1%	22.7%
ANGELIQUE AND THE SULTAN	France	Movie	14/10	20:11	102	11.9%	22.8%
ROBOCOP II	USA	Movie	23/10	20:23	124	11.8%	26.6%
THE BIG HOLIDAYS	France	Movie	17/10	19:55	95	11.7%	24.6%
INDOPTABLE ANGELIQUE	France	Movie	07/10	20:11	87	11.4%	19.9%
ROBOCOP III	USA	Movie	30/10	20:31	114	11.3%	26.8%
LE TATUE	France	Movie	24/10	19:55	99	11.3%	22.3%
ANGELIQUE AND THE KING	France	Movie	30/09	20:10	103	11.3%	19.9%

Source: SIC Gallup Media

LNK							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FORGIVE ME	Lithuanian	Talk Show	16	19:30	50	21.0%	35.1%
STREAMS	Lithuanian	Magazine	30	19:30	50	20.5%	34.1%
NEIGHBOURS	Lithuanian	Series-Family	17	20:20	30	18.6%	30.3%
INDIAN SUMMER	Lithuanian	Talk Show	30	19:35	55	18.4%	31.4%
EUROSICKNESS	Lithuanian	Sport	69	20:15	15	17.8%	36.6%
TELELOTO SHOW	Lithuanian	Game Show	52	19:30	50	17.5%	35.7%
THE OWNER	Mexico	Ser.-Daily soap	47	17:15	45	16.6%	42.9%
NOT YET THE EVENING	Lithuanian	Game Show	30	20:00	30	15.9%	27.7%
THE NOSE	Lithuanian	Comedy Show	49	20:25	30	15.8%	42.6%
N-14	Lithuanian	Magazine	62	19:45	15	14.8%	31.1%

Top 10 Single Programmes		Genre	Date	Start.Time	Length (m.)	Audience	Share
BBAL EU-LEAG. ZALG.-EFES PILSEN		Sport	23/03	20:27	95	23.9%	43.1%
BBAL EU-LEAG. ZALG.-CRVENA ZVEZ.		Sport	07/01	20:28	91	23.8%	40.0%
BBAL EU-LEAG. ZALG.-CRVENA ZVEZ.		Sport	04/02	20:27	81	23.5%	43.7%
BBAL EU-LEAG. ZALG.-EFES PILSEN		Sport	25/03	16:57	96	23.5%	53.5%
BBAL EU-LEAG. ZALG.-TDK MANRESA		Sport	11/02	20:26	107	22.7%	44.3%
BBAL EU-LEAG. ZALG.-CIBONA		Sport	21/01	20:27	90	22.7%	39.5%
BBAL EU-LEAG. ZALG.-ULKER		Sport	02/03	20:29	88	22.5%	41.2%
BBAL EU-LEAG. ZALG.-TDK MANRESA		Sport	14/01	20:27	92	22.0%	42.2%
BBAL EU-LEAG. ZALG.-REAL		Sport	11/11	20:32	89	21.8%	37.6%
BBAL EU-LEAG. ZALG.-PANATHINAI.		Sport	23/09	20:28	90	21.1%	38.4%

Source: SIC Gallup Media

LTV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NIGHT-WALKER	Lithuanian	Magazine	25	20:05	50	14.5%	26.6%
PANORAMA	Lithuanian	News	225	20:30	30	13.0%	23.0%
OFFSPRING	Lithuanian	Series-Family	6	20:00	60	12.6%	21.7%
THE PRESENTIMENT	Lithuanian	Talk Show	24	21:00	30	9.8%	21.3%
THE LAST CROSS-ROAD	Lithuanian	Talk Show	43	21:00	45	9.7%	17.3%
THE PEARL	Lithuanian	Game Show	205	20:00	5	8.8%	14.9%
THE GREETING CONCERT	Lithuanian	Music	83	15:00	70	8.6%	32.8%
THE LITTLE HOUSE ON THE PRAIR.	USA	Series-Family	48	16:15	50	8.1%	28.3%
THE NANNY	USA	Series-Family	46	20:45	25	8.0%	15.4%
AFTERNOON WITH A. CEKUOLIS	Lithuanian	Magazine	40	14:30	30	7.6%	29.8%

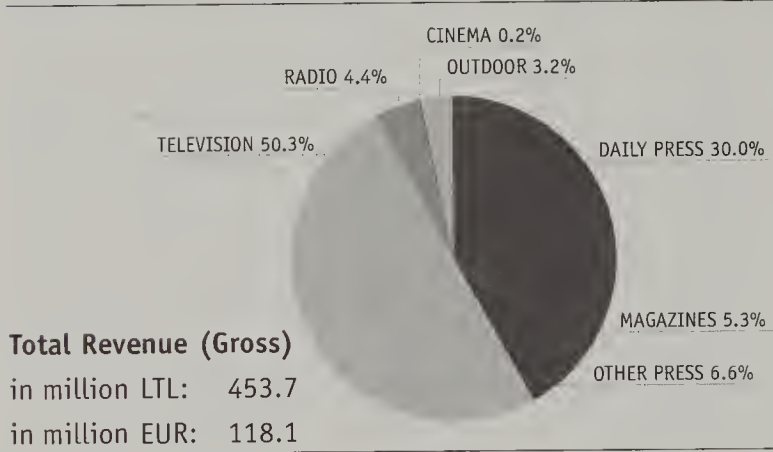
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
V. LANDSBERGIS IN THE STUDIO	Lithuania	News	21/04	20:59	5	15.7%	28.1%
SPEECH OF A. ILGINIS	Lithuania	News	16/08	20:53	10	15.0%	27.3%
BBAL LITHUANIA-CROATIA		Sport	24/02	19:53	88	14.7%	25.4%
SPEECH OF LR PREZID. V. ADAMKUS	Lithuania	News	27/10	20:57	10	12.4%	21.8%
G. VAGNORIUS IN THE STUDIO	Lithuania	News	19/02	20:04	55	11.8%	19.4%
R. PAKSAS IN THE STUDIO	Lithuania	News	18/10	20:58	7	10.4%	21.3%
HEADS OF LR SEIMAS IN THE STUD.	Lithuania	News	29/09	20:59	56	9.4%	16.8%
SPEECH OF K. PLATELIS	Lithuania	News	31/08	20:59	5	9.2%	17.6%
SPEECH OF I. DEGUTIENE	Lithuania	News	28/10	20:25	5	9.2%	15.9%
BBAL LITHUANIA-ICELAND		Sport	27/02	17:54	90	9.0%	23.4%

Source: SIC Gallup Media

Advertising Expenditure

ADVERTISING FIGURES		GROSS	NET
Total adspend	(in million LTL)	454	228
Total adspend	(in million USD)	113	57
Total adspend	(in million EUR)	118	59.4
TV adspend	(in million LTL)	228	70
TV adspend	(in million USD)	57	18
TV adspend	(in million EUR)	59.4	18.2
TV adspend	in % of GDP	0.54	0.17
TV adspend	per capita (USD)	15.4	4.7

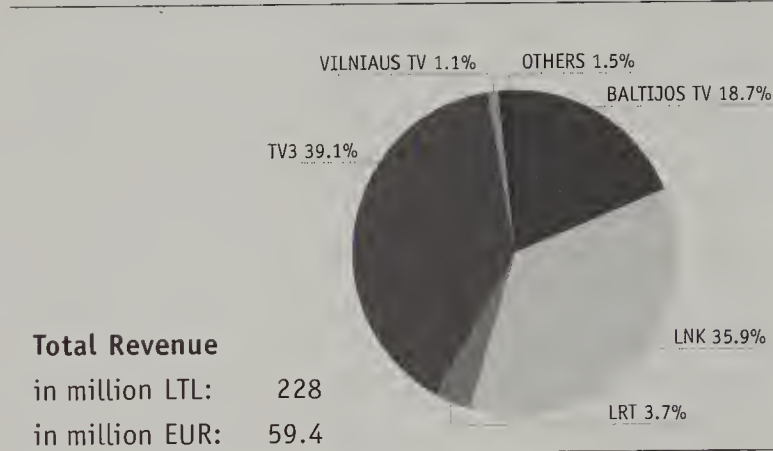
SHARE OF MEDIA EXPENDITURE		GROSS
Category: Market Share in %		



TV ADVERTISING STATISTICS	
Total number of spots broadcast	120716
Average spot length (in sec.)	22
Total number of advertisers	14600
Number of TV advertisers	750
Total number of advertised products	8904
Number products advertised on TV	606

Source: SIC Gallup Media

SHARE OF TV ADVERTISING REVENUE	
Channels: Advertising Market Share in %	



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
HOUSEHOLD HYGIENE	42.7	42.2	98.8%	18.5%
CONCERTS, FESTIVALS, SHOWS	34.4	21.5	62.5%	9.4%
REMEDIES	21.4	16.6	77.6%	7.3%
SWEETS, CONFECTIONERY	17.7	16.0	90.4%	7.0%
HAIR CARE	16.2	15.0	92.6%	6.6%
MINERAL WATERS, SOFT DRINKS	13.9	11.9	85.6%	5.2%
COFFEE, TEA, COCOA	12.0	10.9	90.8%	4.8%
RECORDINGS	14.6	9.9	67.8%	4.3%
ALCOHOLIC BEVERAGES	16.4	9.4	57.3%	4.1%
ORAL CARE	8.8	8.6	97.7%	3.8%
OTHER	255.6	95.9	37.5%	42.1%
TV Advertisers				
PROCTER & GAMBLE	67.2	66.6	99.1%	29.2%
UNILEVER	24.5	24.0	98.0%	10.5%
KRAFT JACOBS SUCHARD	7.9	6.6	83.5%	2.9%
BENCKISER	5.6	5.6	100.0%	2.5%
WRIGLEY	4.8	4.8	100.0%	2.1%
TELEINFORMACIJOS PASLAUGOS	4.1	3.5	85.4%	1.5%
UTENOS ALUS	4.2	3.1	73.8%	1.4%
OLIF-JA	5.0	2.7	54.0%	1.2%
JOHNSON & JOHNSON	3.0	2.7	90.0%	1.2%
DANDY CHEWING GUM	2.6	2.5	96.2%	1.1%
OTHER	324.7	105.9	32.6%	46.4%
Total (in million LTL)	453.7	228.0	50.3%	100.0%
Total (in million EUR)	118.1	59.4	50.3%	100.0%

Source: SIC Gallup Media

The second year since granting the first concessions for the pursuit of broadcasting activity in Macedonia, was marked by extremely difficult conditions for the operation of all electronic media. In addition to the adverse economic situation of the country, another burden was regional crisis which had serious reflections, both on economic relations in general and on the operation of electronic media. Holders of the first concessions for terrestrial television were faced with very severe competition at the beginning of their operation due to the large amount of electronic media, and unfair competition was also present as a result of a number of pirate stations. It was probably due to the difficult operating conditions that, at the end of 1999, a significant number of electronic media (23 local radio and 10 television stations) have not paid the fee for the first year, and therefore lost their concession.

The public broadcasting service broadcasts programmes on three channels of Macedonian Television and on 10 local public TV stations. The private sector is comprised of two commercial TV networks, A1 and Sitel, and 42 local commercial TV stations. The public broadcasting service, Macedonian Television, broadcasts a 24-hour programme on its first channel, the genre is structured to meet the interest of all segments of audience. Macedonian Television, on its second channel, in addition to programmes in the Macedonian language, broadcasts various programmes in languages of five national minorities (in Albanian, Turkish, Roma, Serbian and Vlach language). Local public television stations broadcast programmes addressed to local audiences whereas local commercial television stations, with some exceptions, broadcast mainly entertainment programmes and movies.

The programme structure of both commercial networks, A1 and Sitel, is multifarious and follows the concept of the public service. Both networks broadcast a 24hour programme, that contains all types of genre: news, current affairs, documentaries, children and educational programmes, movies, music and entertainment programmes.

The general conclusion for this period is that programmes that were broadcasted on television, particularly by commercial stations, were mainly poor quality. The number of stations that broadcast pirate movies and soap operas is still considerably high.

Almost every TV channel, including the public service, broadcasts some endless soap opera or telenovela in prime time. One can freely say that this genre, in the absence of series of a higher quality, is the one that is mostly viewed not only in prime time, but also in the other time bands. Unfortunately, due to the persistent bad financial situation, the programme quality of the public broadcasting service has fallen, too. Under the circumstances of having a strong competition from the private sector, the public service, instead of focusing itself on strengthening its programme quality, oriented itself

primarily towards a commercialization of its programme, broadcasting various types of gameshows in prime time, commercializing part of the existing programmes and often overstepping the limits for broadcasting as identified by the Law.

Broadcasters (public and commercial) are obliged to produce and broadcast programmes of local production and foster and develop cultural and language identity of the Macedonian population and national minorities. At least 40% of the total broadcasted programme should be made up of local productions, but unfortunately, up till now, only few broadcasters have honoured this obligation.

A tender for granting concessions to cable operators is underway, so that very soon we can expect to see 20 cable networks set up in Macedonia, mainly in the bigger towns. And soon after granting the first concessions for a cable television distribution network, we expect to see developments in new services based on digital technology.

Last year the Broadcasting Council raised an initiative to establish a Joint Industry Committee, JIC, and introduce continuous public measurement in Macedonia. In the framework of the preparations to establish the JIC, a pilot research has been conducted aimed at identifying the most appropriate methodology for conducting measurements. Due to the lack of funds to install peoplemeters, measurements will most probably be realized through the traditional diaries to begin with. Up till now, certain measurements of audience were conducted by independent research agencies, whose results were only used by advertising agencies, and not by the media.

Media advertising regulations are identified in the Law on Broadcasting Activity and, for the most part, comply with the rules identified in European regulation. The Broadcasting Council recently raised an initiative to adopt a self-regulatory document – the Code for Advertising, that would be adopted by media, advertisers and advertising agencies.

There is still no data for television advertising expenditure nor for any other media. The following forms of advertising can most often be seen on TV: traditional spots, sponsoring, teleshopping and infomercials.

Macedonia

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General Data

COUNTRY	
Land area (km ²)	25 333
Total population	2 012 705
Number of households	530 919
Average household size	3.8
In % of population equipped	
Phone	89.8
Mobile telephone subscribers	2.4
PC's	n.a.
Internet access	0.6
Internet users	0.8

Sources: Republic Bureau of Statistics/National Bank of the Republic of Macedonia

ECONOMICS	
GDP in million MKD (at current prices)	195 284*
GDP per capita in MKD (at current prices)	102 423*
Inflation rate in 1999 (in %)	1.1
Value of MKD in Euro (EUR)**	1 EUR = 60.66 MKD
Value of MKD in US-Dollar (USD)**	1 USD = 60.34 MKD

* Estimation, **Annual Average

TV OVERVIEW	
Total number of TV households (TVHH)	487 513
In % of all households	92.0
Numbers of channels received by 70% of the population	7
TV License-Fee cost per year	MKD 2 853.–/EUR 47.–

TV EQUIPMENT	
	in % of TVHH
Colour TV	77.0
Multiset (homes with more than 1 TV set)	23.0
VCR	46.0
Teletext	n.a.
Remote control	67.0

Source: Broadcasting Council

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	n.a.
Satellite	private dish/DTH	8.5
	collective dish/SMATV	10.0
Terrestrial	analog	100.0
	digital	none
	MMDS	none

TV SUBSCRIPTION			
Analog pay TV subscribers	none	Digital TV subscribers	none

Source: Broadcasting Council

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
MACEDONIAN TV 1	1964	T	100%	Macedonian	168	Generalist	L–F, Adv.	In-house
MACEDONIAN TV 2	1976	T	100%	Macedonian*	91	Generalist	L–F, Adv.	In-house
MACEDONIAN TV 3**	1991	T	50%	n.a.	n.a.	***	n.a.	n.a.
*Albanian, Turkish, Roma, Serbian, Vlach, **It will be part of the Macedonian Television till the end of 2000, ***Currently, it broadcasts 24 hours per day (14 hours the same programme that is broadcasted on the First Channel, 4 hours movies and 4 hours foreign informative programmes (TV 5, Deutsche Welle, BBC World, CNN etc.)								
DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
A1 TELEVISION	1992*	T	76%	Macedonian	168	Generalist	Adv.	In-house
SITEL TELEVISION	1994*	T	76%	Macedonian	168	Generalist	Adv.	In-house

Source: RM Broadcasting Council

*Concession granted in 1998

DOMESTIC CHANNELS (REGIONAL PRIVATE)							
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue
KANAL 5-SKOPJE	1998	T	28.9%	Macedonian	168	Generalist	Adv.
TELMA-SKOPJE	1998	T	28.9%	Macedonian	168	Generalist	Adv.
TV SKOPJE-SKOPJE	1998	T	28.9%	Macedonian	70	Movies, Series	Adv.
SUTEL-SKOPJE	1998	T	28.9%	Mac/Roma	98	News, Entert.	Adv.
ERA-SKOPJE	1998	T	28.9%	Mac/Albanian	73	News, Entert.	Adv.
MTM-SKOPJE	1998	T	28.9%	Macedonian	70	News, Entert.	Adv.
SKAJ NET-SKOPJE	1998	T	28.9%	Macedonian	84	News, Entert.	Adv.
TV 96-SKOPJE	1998	T	28.9%	Mac/Serbian	84	News, Entert.	Adv.
BTR NACIONAL-SKOPJE	1998	T	28.9%	Mac/Roma	84	News, Entert.	Adv.
TERA-BITOLA	1998	T	6.3%	Macedonian	168	Generalist	Adv.
ORBIS-BITOLA	1998	T	6.3%	Macedonian	168	Generalist	Adv.
KALTRINA-STRUGA	1998	T	2.7%	Mac/Albanian	84	News, Entert.	Adv.
SPEKTRA-STRUGA	1998	T	2.7%	Macedonian	84	Entert.	Adv.
NEZAVISNA TV-OHRID	1998	T	3.4%	Macedonian	86	Entert.	Adv.
STUDIO TVM-OHRID	1998	T	3.4%	Macedonian	56	News, Entert.	Adv.
KANAL 12-GEVGELIJA	1998	T	2.0%	Macedonian	56	Entert.	Adv.
INTEL-STRUMICA	1998	T	4.6%	Macedonian	84	Entert.	Adv.
VIS-STRUMICA	1998	T	4.6%	Macedonian	98	News, Entert.	Adv.
ART-TETOVO	1998	T	10.3%	Mac/Albanian	84	News, Entert.	Adv.
KOHA-TETOVO	1998	T	10.3%	Mac/Albanian	98	Entert.	Adv.
KISS-TETOVO	1998	T	10.3%	Macedonian	112	News, Entert.	Adv.
GLOBUS-GOSTIVAR	1998	T	4.0%	Mac/Albanian	112	Entert.	Adv.
DUE-GOSTIVAR	1998	T	4.0%	Mac/Albanian	84	News, Entert.	Adv.
ZERI I CEGRANIT-GOSTIVAR	1998	T	4.0%	Mac/Albanian	84	Entert.	Adv.
ZORA-KUMANOVO	1998	T	6.0%	Macedonian	91	News, Entert.	Adv.
DALGA KRT-KUMANOVO	1998	T	6.0%	Macedonian	91	Entert., Adv.	Adv.
FESTA-KUMANOVO	1998	T	6.0%	Mac/Albanian	84	News, Entert.	Adv.
HANA-KUMANOVO	1998	T	6.0%	Mac/Albanian	91	News, Entert.	Adv.
MARKONI-PRILEP	1998	T	5.4%	Macedonian	84	Entert.	Adv.
BOEM-KICEVO	1998	T	2.6%	Macedonian	56	Entert.	Adv.
GURA-KICEVO	1998	T	2.6%	Mac/Albanian	84	Entert.	Adv.
USKANA-KICEVO	1998	T	2.6%	Mac/Albanian	56	Entert.	Adv.
ZUPA-DEBAR	1998	T	0.6%	Mac/Albanian	74	Entert.	Adv.
IRIS-STIP	1998	T	3.0%	Macedonian	84	News, Entert.	Adv.
ZDRAVKIN-VELES	1998	T	3.9%	Macedonian	98	News, Entert.	Adv.
VTV-VALANDOVO	1998	T	0.6%	Macedonian	56	News, Entert.	Adv.
SVET-SVETI NIKOLE	1998	T	1.2%	Macedonian	91	News, Entert.	Adv.
KOBRA-RADOVIS	1998	T	1.6%	Macedonian	56	Entert.	Adv.
EMI-RADOVIS	1998	T	1.6%	Macedonian	98	Entert.	Adv.
MIG 21-DOJHRAN	1998	T	1.5%	Macedonian	84	Entert.	Adv.

Source: RM Broadcasting Council

NB: Programme structure of all local private TV channels is focused on entertainment (music, movies, talk-shows), news and information covering local events and advertising.

DOMESTIC CHANNELS (REGIONAL PUBLIC)							
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue
TV PRILEP	1991	T	5.4%	Macedonian	98	Generalist	L-F, Adv.
TV DELCEVO	1993	T	1.4%	Macedonian	63	Generalist	L-F, Adv.
TV NEGOTINO	1998	T	1.3%	Macedonian	56	Generalist	L-F, Adv.
TV GEVGELIJA	1998	T	2.0%	Macedonian	84	Generalist	L-F, Adv.
TV KAVADARCI	1998	T	2.4%	Macedonian	63	Generalist	L-F, Adv.
TV KOCANI	1993	T	2.7%	Macedonian	84	Generalist	L-F, Adv.
TV KUMANOVO	1998	T	6.0%	Macedonian	126	Generalist	L-F, Adv.
TV VINICA	1998	T	1.1%	Macedonian	168	Generalist	L-F, Adv.

Source: RM Broadcasting Council

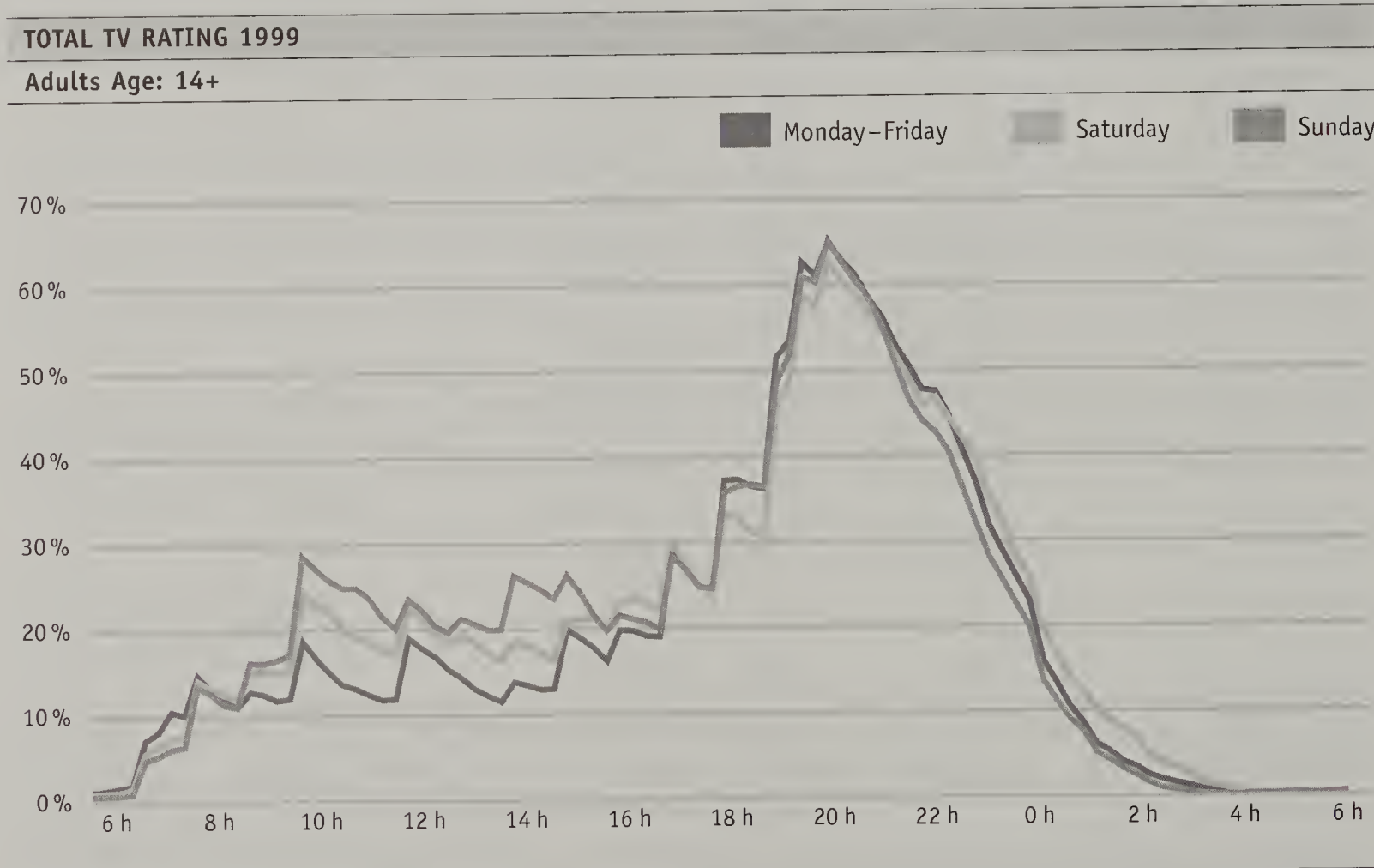
INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Sales House
CNN INT.	Private	T, S	50%	English	News	Adv.
TV5 EUROPE	Public	T, S	50%	French	Generalist	L-F
BBC WORLD	Private	T, S	50%	English	News	Adv.
DEUTSCHE WELLE	Public	T, S	50%	English	Generalist	Gvt

Source: RM Broadcasting Council

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	SMMRI (Strategic Marketing & Media Research Institute)
Panel/Sampling Size	1 100
Instrument used (people-meter, telefon, face-to-face)	Face-to-Face
	Population size in 000
Individuals 10+	1 621
Adults 14+	1 489
Young Adults 14-49	1 039

Source: SMMRI

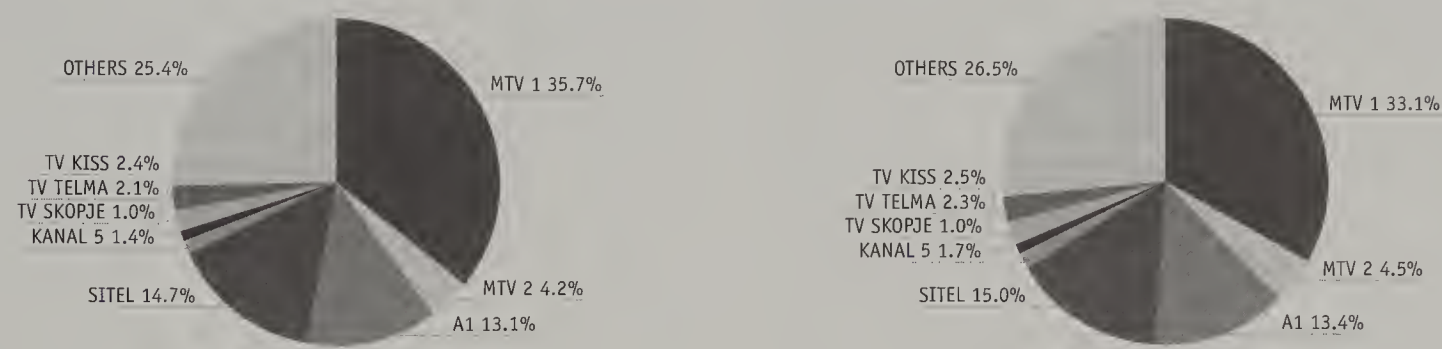


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)				
	Adults 14+		Young Adults 14-49	
	1998	1999	1998	1999
Daily reach in %	95.0	95.0	95.0	94.7
Viewing time per Viewer	276	289	274	228
Viewing time per Individual	262	275	260	273

Source: SMMRI

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS	
Adults 14+, all day (04:00–04:00)	Young Adults 14–49, all day (04:00–04:00)



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 04:00 – 04:00				
	Adults 14+		Young Adults 14–49	
	1998	1999	1998	1999
MTV 1	33.7%	35.7%	30.7%	33.1%
MTV 2	3.4%	4.2%	3.6%	4.5%
A1	12.5%	13.1%	12.6%	13.4%
SITEL	12.7%	14.7%	13.1%	15.0%
KANAL 5	1.9%	1.4%	2.1%	1.7%
TV SKOPJE	1.7%	1.0%	1.7%	1.0%
TV TELMA	1.8%	2.1%	2.0%	2.3%
TV KISS	3.8%	2.4%	3.6%	2.5%
OTHER	28.5%	25.4%	30.6%	26.5%

Source: SMMRI

The year 1999 was particularly curious for Polish television market research. On the one hand, the perspective of retiring funds and telecommunication' services campaigns let us suppose that TV advertising expenses would increase to 50%; the results, however, showed that despite its remarkable expansion in the last years, the Polish TV advertising market entered a slower phase in 1999, achieving a rate of growth of about 30%. On the other hand, most of the budgets are still located in TV (more than 50%). Together with a broadening Polish TV offer, the average time spent watching TV by Poles is increasing and in 1999 this average increased by 5-6%. Last year, two important factors influenced TV audience size: the significant expansion of digital platforms - Wizja TV and Cyfra + with a wide range of various polish-language programmes and of course TVN with a large growth in audience (almost doubled) and market share, joining the first league TV stations.

The battle for Polish TV viewers brought a more interesting programming offer and, as a result, global growth in audience. In 1999, the biggest favourite was TVN, which received a 10,7% share of total audience (almost 3 times more than in 1998). Public TV lost its share compared to the previous year, most of this was thanks to Program 1 (2.5%). Polsat did not maintain its dynamics, losing the audience share of 25.2% in 1998 to 23.4% in 1999. RTL7 experienced a slight increase in audience share, receiving 3.6%. Nasza TV lost their audience due to financial and legal problems. As a result, TVN is the only station, which has really increased its audience share. In spite of TVN' success, TVP and Polsat kept their leading positions for audience share, mainly thanks to their technical penetration.

In July 1999, CLT-UFA, Europe's leading broadcasting group, announced that it has acquired 100% of the Polish TV station RTL7. CLT-UFA and an affiliate of Universal Television & Networks Group had signed an agreement, which transferred Universal's 50% stake to CLT-UFA. At the same time, RTL7 and Universal Studios International B.V. agreed upon a programme licensing agreement for movies and television series.

In 1999, the most important discussion topics were legal regulations concerning advertising addressed towards children and young people. The negotiations are still not finished, but total prohibition does not make sense, say market specialists. It is resolved, that tobacco advertising will be completely prohibited from the beginning of 2001.

Procter & Gamble and Unilever are still the top advertisers in Poland (with regard to budget), but in comparison to last year, they lowered their budgets significantly (almost 20% less than 1998). The reason is probably the Russian crisis and reduction of the demand on Polish-made products. Moreover Polish consumer behaviour is changing and vehicles, mobile phones or travels abroad have become far more important in the household budget. As a result, consumer expenditure on brand name food or personal body care and detergents is decreasing. All these

aspects meant that the structure of advertising revenues was more varied last year than in previous years. An unexpected player was Benckiser, which raised its TV budget about 70% compared with 1998, leaving behind Unilever.

Competition for viewer and advertiser is ever increasing. In terms of advertising expenditure, the leading position still belongs to Polsat with 35.4% and is bigger than its audience share (23.4%), but it was not as dynamic as in previous years. Public television has lost the fight for budgets, mainly thanks to TVP1, whose investment slightly decreased (30.0%) compared to 1998. On the other hand, it is estimated that TVP and Polsat took about 80% of total TV revenue. The most spectacular success belonged to TVN, which with 16.1% market share almost tripled its turnover. TVN won with TVP2 with 13.2% share in TV ad spend. The following place in this ranking was taken by RTL7, with almost 70% growth in market share. TVN and RTL7 increased mainly thanks to Polsat, which earned less than in 1998. On the other hand, Polsat2 the „little brother“ of Polsat increased c.a. 360%, compared to previous year, but it is still a small market share (0.9%).

This caused an interesting situation in TV budget strategy. The almost equal positions of TVP and Polsat, and the growth of TVN, provoked a considerable consolidation of TV budgets. As a result, price negotiations became far more important. This, however, causes difficulties in estimating real TV advertising expenditure. The situation is more difficult for the smaller and new arrivals.

It is clear that TV expenses seasonality has flattened out and the traditional autumn TV peak has lost its importance. In 1998, it was because of the Russian crisis, and in 1999 - spring activity of retiring funds.

The year 1999 did not bring any spectacular achievements or defeats, simply stabilization. The majority of people see this situation as a normalisation of the Polish advertising market rather than as a stagnation. For all TV stations the next years will not be easy and the market situation will force them to spend more but with less return than in previous years. The year 2000 should see a 18-22% growth in the Polish TV market. It can only be changed by a faster growth of the whole Polish economy.

Poland

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General Data

COUNTRY	
Land area (km²)	312 685
Total population	38 661 000
Number of households	13 219 600
Average household size	2.9
In % of households/population equipped	
Phone	64.9/67.9
Mobile telephone subscribers	11.6/14.2
PC's	12.8/16.6
Internet access	3.0*/1.2
Internet users	11.0**

Source: GUS (Główny Urząd Statystyczny), AGB Polska–Establishment Survey '99 (2 waves spring and autumn) *OBOP Establishment Survey 1999, **GfK Poland

ECONOMICS	
GDP in million PLN (at current prices)	611 576
GDP per capita in PLN (at current prices)	15 819
Inflation rate in 1999 (in %)	7.3*
Value of PLN in Euro (EUR)	1 EUR = 4.23 PLN
Value of PLN in US-Dollar (USD)	1 USD = 3.97 PLN

Sources: GUS (Główny Urząd Statystyczny), CASE (Centrum Analiz Społeczno-Demograficznych) *average'99 compared to an average '98

TV OVERVIEW	
Total number of TV households (TVHH)	12 933 000
In % of all households	97.8
Numbers of channels received by 70% of the population	3
TV License-Fee cost per year	PLN 138.–/EUR 32.6

TV EQUIPMENT	
	in % of TVHH
Colour TV	94.9
Multiset (homes with more than 1 TV set)	26.1
VCR	49.0
Teletext	55.4
Remote control	83.9

Sources: AGB Polska, Establishment Survey'99 (2 waves spring and autumn)

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	32.2
Satellite	private dish/DTH	15.5
	collective dish/SMATV	1.2
Terrestrial	analog	75.5
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	380 000	Digital TV subscribers	565 000

Sources: AGB Polska, Establishment Survey '99 (2 waves spring and autumn)

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TVP 1	1952	T, C, S	99.2%	Polish	127	Generalist	L-F, Adv.	In-house
TVP 2	1970	T, C, S	98.2%	Polish	121	Generalist	L-F, Adv.	In-house
TV POLONIA	1993	C, S	41.4%	Polish	168	Generalist	L-F, Adv.	In-house

Sources: AGB Polska, ES'99 (2 waves spring and autumn)

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
POLSAT	1992	T, C, S	92.0%	Polish	132	Generalist	Adv.	PAI-Media
POLSAT 2	1997	C, S	40.0%	Polish	129	Generalist	Adv.	PAI-Media
TVN	1997	T, C, S	56.0%	Polish	130	Generalist	Adv.	In-house
RTL 7	1996	C, S	40.0%	Polish	168	Generalist	Adv.	IP Polska
POLONIA 1	1994	C, S	27.0%	Polish	140	Generalist	Adv.	Publipolska
NASZA TV	'98-'00	T, C, S	36.0%	Polish	n.a.	Generalist	Adv.	In-house
ALE KINO	n.a.	C, S	3.0%	Polish	168	Movies	n.a.	n.a.
ATOMIC TV	1996	C, S	10.0%	Polish	168	Music	Adv.	In-house
CANAL+	1994	T, C, S	29.0%	Polish	148	Movies, Sport	Adv.	In-house
DLA CIEBIE	n.a.	C, S	3.0%	Polish	n.a.	n.a.	n.a.	n.a.
FORMULA 1	n.a.	C, S	3.0%	Polish	n.a.	n.a.	n.a.	n.a.
KOMEDIA	n.a.	C, S	3.0%	Polish	n.a.	n.a.	n.a.	n.a.
RELAX	n.a.	C, S	2.0%	Polish	n.a.	n.a.	n.a.	n.a.
MINIMAX	n.a.	C, S	2.0%	Polish	n.a.	n.a.	n.a.	n.a.
SMYK	n.a.	C, S	3.0%	Polish	n.a.	n.a.	n.a.	n.a.
TROCHE/MLODSZA*	n.a.	C, S	6.0%	Polish	n.a.	n.a.	n.a.	n.a.
TV NIEPOKALANOW	n.a.	T, C, S	5.0%	Polish	49	Religious	n.a.	n.a.
PTK 1	n.a.	C, S	2.0%	Polish	n.a.	n.a.	n.a.	n.a.
ASTER CITY	n.a.	C	1.0%	Polish	140	Generalist	Adv.	n.a.
NTL RADOMSKO	n.a.	T, C	0.3%	Polish	56	Movies	Adv.	TV Odra
TE DE WROCLAW	n.a.	T, C	2.0%	Polish	n.a.	n.a.	n.a.	n.a.
TV AVAL	n.a.	T, C	0.2%	Polish	n.a.	n.a.	n.a.	n.a.
TV BRYZA	n.a.	T, C	1.4%	Polish	56	Movies	Adv.	TV Odra
TV LEGNICA	n.a.	T, C	0.4%	Polish	n.a.	n.a.	n.a.	n.a.
TV ZIELONA GORA	n.a.	T, C	0.4%	Polish	56	Movies	Adv.	TV Odra
VIGOR	n.a.	T, C	0.4%	Polish	56	Movies	Adv.	TV Odra

Sources: AGB Polska, ES '99 (2 waves spring and autumn) *TELEWIZJA

DOMESTIC CHANNELS (REGIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TV BIALYSTOK	1997	T, C	2.8%	Polish	119	Generalist	L-F, Adv.	In-house
TV BYDGOSZCZ	1994	T, C	6.9%	Polish	119	Generalist	L-F, Adv.	In-house
TV GDANSK	1992	T, C	5.2%	Polish	119	Generalist	L-F, Adv.	In-house
TV KATOWICE	1985	T, C	14.7%	Polish	119	Generalist	L-F, Adv.	In-house
TV KRAKOW	1993	T, C	8.9%	Polish	119	Generalist	L-F, Adv.	In-house
TV LUBLIN	1992	T, C	4.6%	Polish	119	Generalist	L-F, Adv.	In-house
TV LODZ	1993	T, C	7.5%	Polish	119	Generalist	L-F, Adv.	In-house
TV POZNAN	1994	T, C	6.1%	Polish	119	Generalist	L-F, Adv.	In-house
TV RZESZOW	1997	T, C	1.4%	Polish	119	Generalist	L-F, Adv.	In-house
TV SZCZECIN	1992	T, C	3.5%	Polish	119	Generalist	L-F, Adv.	In-house
TV WROCLAW	1992	T, C	10.5%	Polish	119	Generalist	L-F, Adv.	In-house
WOT	1994	T, C	10.8%	Polish	119	Generalist	L-F, Adv.	In-house

Sources: AGB Polska, ES '99 (2 waves spring and autumn)

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diff.	Tech. Pen.	Language	Programming	Revenue
3 SAT	Public	C, S	19.0%	German	Generalist	L-F
BBC PRIME	Public	C, S	5.8%	English	Entertain.	Adv.
BBC WORLD	Private	C, S	13.7%	English	News	Adv.
BLOOMBERG TV	Private	C, S	2.9%	English	News/Finance	Adv.
CMT	n.a.	C, S	1.7%	English	n.a.	n.a.
CNBC	Private	C, S	8.5%	English	Economy	Adv.
CNN	Private	C, S	15.9%	English	News	Adv.
DEUTSCHE WELLE	Public	C, S	9.5%	German	News/Docum.	Gvt.
EURONEWS	Private	C, S	9.6%	Eng/Fr/It/Sp/Ger	News	Adv.
FASHION TV	Private	C, S	6.3%	English	Fashion	n.a.
GALAVISION	Private	C, S	1.2%	Spanish	Generalist	Adv.
MCM	Private	C, S	3.6%	French	Music	Adv., Sub
MTV	Private	C, S	14.7%	Eng /Ger	Music	Adv.
MUZZIK	Private	C, S	3.7%	German	Class. Music	Adv.
NBC SUPER	Private	C, S	4.2%	English	n.a.	n.a.
NICKELODEON	Private	C, S	0.8%	German	Children	Adv.
RTP	Public	C, S	3.5%	Portugese	Generalist	Adv., Gvt
SKY NEWS	Private	C, S	11.3%	English	News	Adv.
SKY ONE	Private	C, S	3.4%	English	Entertain.	Adv.
TRT INTERNATIONAL	Public	C, S	2.9%	Turkish	Generalist	L-F, Adv.
TVE (ESPANIA)	Public	C, S	11.0%	Spanish	Generalist	L-F, Spon
ANIMAL PLANET	Private	C, S	14.5%	Pol /Eng	Docum.	Adv.
CARTOON NETWORK	Private	C, S	25.6%	Pol /Eng	Old Movies/Cartoons	Adv.
DISCOVERY	Private	C, S	22.1%	Pol /Eng /Ger	Docum.	Adv.
EUROSPORT	Private	C, S	35.6%	Pol /Eng /Ger	Sport	Adv.
FOX KIDS	Private	C, S	5.2%	Pol /Eng	n.a.	n.a.
HALLMARK	n.a.	C, S	5.6%	Polish	n.a.	n.a.
NATIONAL GEOGRAPHIC	Private	C, S	8.7%	Pol /Eng	Docum.	Adv.
PLANETE	n.a.	C, S	12.5%	Pol /Eng	Docum.	Adv.
QUEST TV	n.a.	C, S	4.8%	Polish	n.a.	n.a.
TRAVEL CHANNEL	n.a.	C, S	9.5%	Pol /Eng /Ger	Travel	Adv.

Sources: AGB Polska, ES '99 (2 waves spring and autumn)

OTHER FOREIGN CHANNELS						
Channels	Nature	Diff.	Tech. Pen.	Language	Programming	Revenue
ARD	Public	C, S	8.6%	German	Generalist	L-F, Adv.
BR	Public	C, S	2.0%	German	Generalist	L-F
DSF	Private	C, S	19.3%	German	Sport	Adv.
FRANCE 2	Public	C, S	1.9%	French	Generalist	L-F, Adv.
KABEL 1	Private	C, S	5.4%	German	Generalist	Adv.
M6	Private	C, S	6.0%	French	Generalist	Adv., Sub
NORD 3	Public	C, S	4.0%	German	Generalist	L-F
ONYX	Private	C, S	10.3%	German	Music	Adv.
PHOENIX	Public	C, S	1.7%	German	Docum.	L-F
PRO 7	Private	C, S	22.5%	German	Generalist	Adv.
RAI DUE	Public	C, S	11.2%	Italian	Generalist	L-F, Adv.
RAI TRE	Public	C, S	7.8%	Italian	Generalist	L-F, Adv.
RAI UNO	Public	C, S	22.1%	Italian	Generalist	L-F, Adv.
RTL	Private	C, S	25.9%	German	Generalist	Adv.
RTL 2	Private	C, S	23.6%	German	Generalist	Adv.
SAT 1	Private	C, S	22.9%	German	Generalist	Adv.
SUPER RTL	Private	C, S	12.1%	German	Entertain.	Adv.
TM 3	Private	C, S	2.9%	German	Entertain.	Adv.
TV 4	Private	C, S	2.3%	Swedish	Generalist	Adv.
VIVA	Private	C, S	28.7%	German	Music	Adv.
VIVA 2	Private	C, S	20.8%	German	Music	Adv.
VOX	Private	C, S	18.5%	German	Generalist	Adv.
WDR	Public	C, S	5.1%	German	Generalist	L-F
ZDF	Public	C, S	13.0%	German	Generalist	L-F, Adv.
MBC	n.a.	C, S	3.4%	Arabian	n.a.	n.a.
NTV	Private	C, S	3.0%	Turkish	News	Adv.
TV 5	Public	C, S	16.9%	French	Generalist	L-F, Spon

Sources: AGB Polska, ES '99 (2 waves spring and autumn), TV International 2000

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
CANAL +	1994	C, S	300 000*	Polish	168	Movie, Sport	n.a.	Adv. Sub.	In-house
HBO	1996	C, S	80 000*	Polish	168	Movie	n.a.	Adv. Sub.	In-house

Sources: AGB Polska, ES '99 (2 waves spring and autumn) *in 1998 (TV International 2000)

DIGITAL PACKAGES									
Channels	Launch	Diff.	Decoder	Subscr.	Language	No. of Ch.	Cost/month	Revenue	Sales H.
WIZJA TV	1998	C, S	d-box, NOKIA	265 000*	Polish	22	low. vers.:45 Pln	Adv. Sub.	In-house
CYFRA +	1998	S	Golden Box*	300 000*	Polish	19	low. vers.:41 Pln	Adv. Sub.	In-house

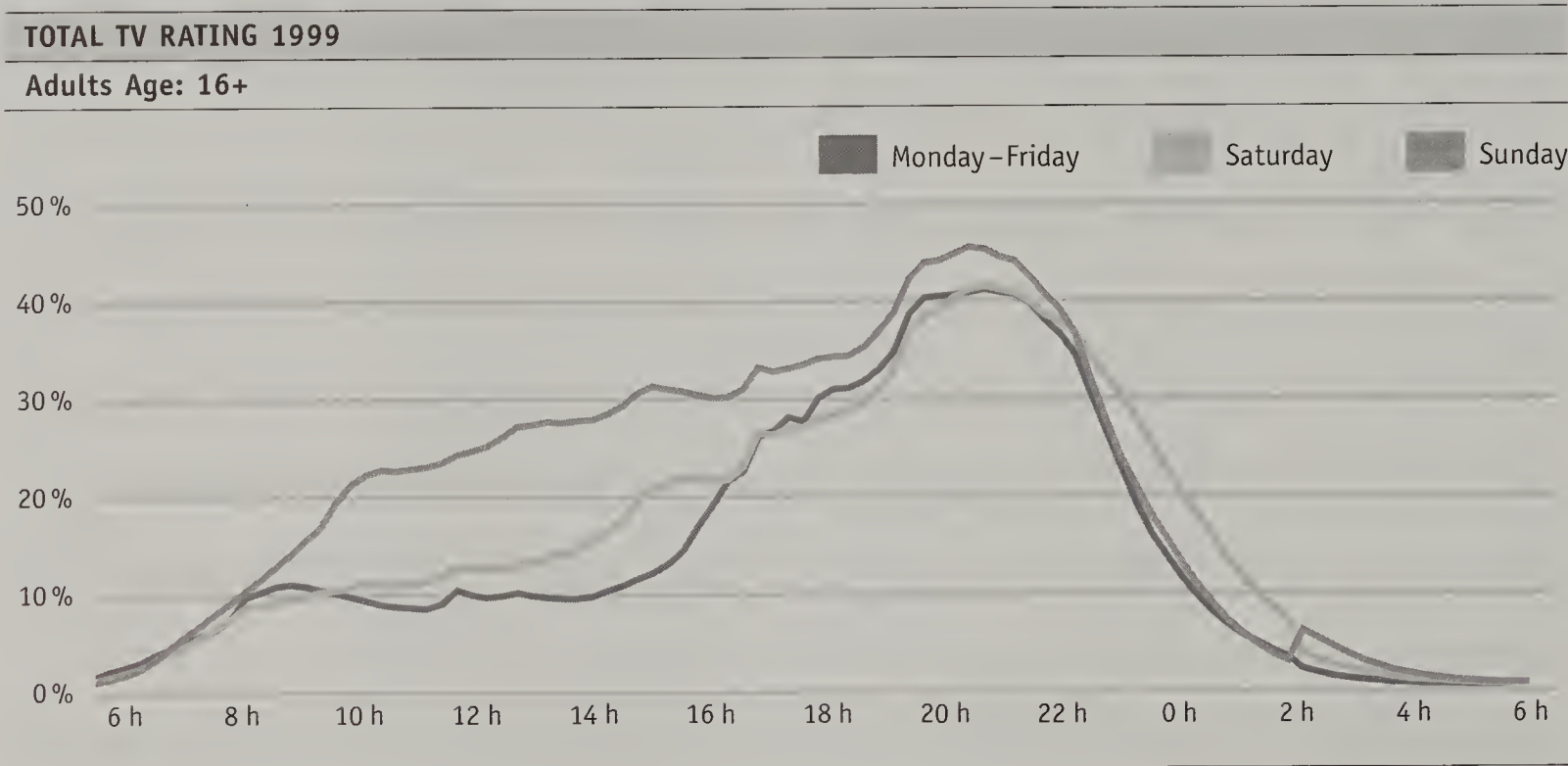
Sources: AGB Polska, ES '99 (2 waves spring and autumn)

*Pioneer

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	AGB Polska	
Panel/Sampling Size	1 215 households, ca. 3 500 individuals	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	37 025	
Adults 16+	30 254	
Main Purchase Responsibles	13 220	
Young Adults 16–29	8 515	
Children 4–15	6 771	

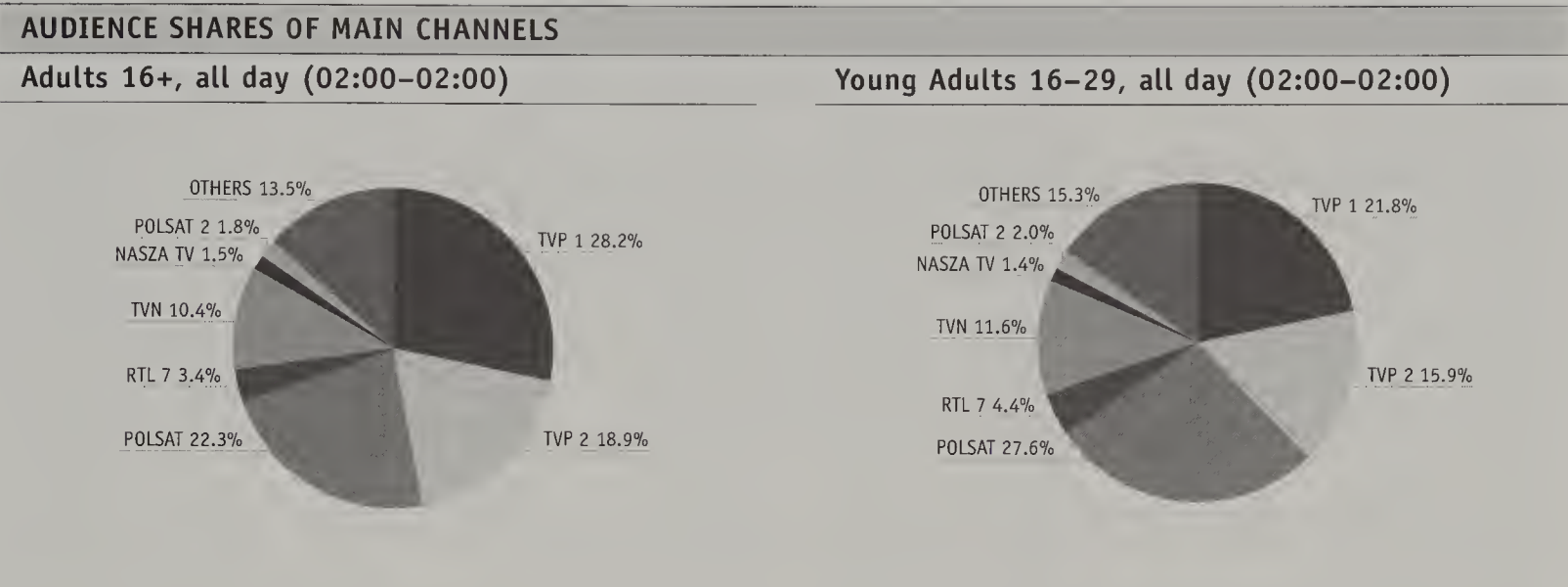
Sources: AGB Polska, Establishment Survey '99 (2 waves spring and autumn)



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Individuals 4+			Children 4-15			Young Adults 16-29			Main Purchase Responsibles		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	74.8	74.2	74.0	74.1	73.5	72.7	67.5	65.6	63.9	81.5	80.7	81.0
Viewing time per Viewer	268	278	288	209	221	225	239	241	244	309	319	330
Viewing time per Individual	202	208	214	157	164	166	162	159	157	253	258	268

Source: AGB Polska

Audience Shares



Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
MAIN NEWS	Poland	TVP1	News	19:30	01/01	33.9%	68.8%
FBAL EU CUP POLAND-ENGLAND	Poland	TVP2	Sport	20:02	08/09	30.5%	65.9%
KLAN	Poland	TVP1	Ser.–Daily Soap	17:26	23/02	30.1%	74.0%
TELEEXPRESS	Poland	TVP1	News	17:00	02/02	28.0%	74.3%
POPE J.P.II, LEAVE	Poland	TVP1	Magazine	17:13	17/06	28.0%	80.4%
GOLDENEYE	USA	TVP1	Movie	20:09	06/03	26.6%	57.7%
SPEECH OF THE POLISH PRESIDENT	Poland	TVP1	Information	20:00	28/11	26.4%	50.6%
DOM	Poland	TVP1	Series–General	20:08	21/03	25.8%	50.7%
13 POSTERUNEK	Poland	Polsat	Sitcom	20:00	26/01	25.1%	50.1%
POPE J.P.II, WELCOME	Poland	TVP1	Information	11:28	05/06	24.4%	83.3%
THE SPECIALIST	USA	Polsat	Movie	20:01	19/04	24.2%	56.2%
EKSTRADYCJA 3	Poland	TVP1	Series–Action	20:14	08/04	24.1%	56.2%
BEYOND THE LAW	USA	Polsat	Movie	21:00	22/02	23.7%	53.9%
PANORAMA	Poland	TVP2	News	21:22	08/09	23.6%	50.0%
SPEECH OF POLISH PRIME MINISTER	Poland	TVP1	Information	20:04	11/03	22.7%	48.6%
SPEED	USA	Polsat	Movie	20:00	04/10	22.7%	52.8%
THE MASK	USA	TVP1	Movie	20:08	13/02	22.4%	45.7%
FBAL POLAND–SWEDEN	Poland	TVP2	Sport	20:00	31/03	22.3%	51.6%
IDZ NA CALOSC	Poland	Polsat	Variety Show	19:05	24/01	22.2%	44.7%
SMIECHU WARTE	Poland	TVP1	Comedy Show	17:27	21/02	22.0%	53.5%

AGB Polska

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
GOLDENEYE	USA	TVP 1	20:09	06/03	26.6%	57.7%
THE SPECIALIST	USA	Polsat	20:01	19/04	24.2%	56.2%
BEYOND THE LAW	USA	Polsat	21:00	22/02	23.7%	53.9%
SPEED	USA	Polsat	20:00	04/10	22.7%	52.8%
THE MASK	USA	TVP 1	20:08	13/02	22.4%	45.7%
RAMBO II	USA	Polsat	21:00	25/01	21.9%	51.5%
PAN WOŁODYJOWSKI	Poland	TVP 2	20:01	15/02	21.9%	47.0%
UNDER SIEGE	USA	Polsat	20:00	29/11	21.9%	47.2%
WROBIONY W SZMARAGDY	USA	Polsat	20:35	23/02	21.8%	49.1%
INDEPENDENCE DAY	USA	Polsat	20:00	08/11	21.7%	50.0%

TOP 10 SPORT EVENTS						
Title	Channel	Start. Time	Date	Audience	Share	
FBAL EU CUP POLAND–ENGLAND	TVP 2	20:02	08/09	30.5%	65.9%	
FBAL POLAND–SWEDEN	TVP 2	20:00	31/03	22.3%	51.6%	
BOXING ANDRZEJ GOŁOTA–JESSE FERGUSON	Polsat	14:30	31/01	21.1%	48.6%	
BOXING	Polsat	17:16	21/11	17.7%	40.7%	
BOXING ANDRZEJ GOŁOTA–QUINN NAVERRE	Polsat	21:00	26/06	16.7%	45.5%	
FBAL EU CUP POLAND–BULGARIA	TVP 2	20:05	04/06	16.4%	42.3%	
BOXING HOLYFIELD–LEWIS	Polsat	17:18	14/11	15.8%	36.5%	
SPORTSMAN OF 1998 (AWARDS)	TVP 1	21:00	31/01	14.6%	30.7%	
FBAL CL BAYERN MÜNCHEN–MANCHESTER UNITED	TVP 2	20:33	26/05	14.1%	36.4%	
BOXING LEWIS–HOLYFIELD	Polsat	14:30	14/03	13.1%	37.9%	

Sources: AGB Polska

Top Programmes Channel by Channel

TVP 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE HOUSE	Poland	Series	8	20:08	85	23.8%	47.5%
THE CLAN	Poland	Ser.–Daily soap	126	17:24	23	22.5%	69.8%
SPORT	Poland	Sport–Magazine	362	19:55	4	22.4%	55.2%
EXTRADITION 3	Poland	Series–Action	10	20:21	54	20.3%	50.5%
MAIN NEWS	Poland	News	362	19:30	25	20.2%	51.5%
TELEEXPRESS	Poland	News	365	16:59	15	16.9%	62.9%
TIGERS OF EUROPE	Poland	Series–Comedy	10	20:09	52	15.9%	32.6%
ODYSEJA	USA	Series	4	20:07	45	14.9%	33.2%
J.A.G.	USA	Series	23	20:12	45	13.8%	30.7%
NASH BRIDGES	USA	Series	19	20:13	43	13.8%	31.4%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
POPE J.P.II, LEAVE	Poland	Magazine	17/06	17:13	108	28.0%	80.4%
GOLDENEYE	USA	Movie	06/03	20:09	124	26.6%	57.7%
SPEECH OF THE POLISH PRESIDENT	Poland	Magazine	28/11	20:00	16	26.4%	50.6%
POPE J.P.II, WELCOME	Poland	Magazine	05/06	11:28	59	24.4%	83.8%
SPEACH OF POLISH PRIME MINISTER	Poland	Magazine	11/03	20:04	9	22.7%	48.6%
THE MASK	USA	Movie	13/02	20:08	97	22.4%	45.7%
NOTHING TO LOOSE	USA	Movie	27/01	20:14	46	21.6%	47.5%
PRIVATE BENJAMIN	USA	Movie	18/06	20:14	105	21.4%	55.6%
BODYGUARD	USA	Movie	15/08	20:07	124	21.4%	49.5%
THE FUGITIVE	USA	Movie	01/05	20:06	125	21.3%	51.8%

Source: AGB Polska

TVP 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NA DOBRE I NA ZLE	Poland	Series	7	16:38	50	15.0%	37.4%
THE CHANCE FOR SUCCESS	Poland	Game Show	22	15:54	54	14.8%	47.4%
ZLOTOPOLSCY	Poland	Daily Soap	108	15:24	24	13.6%	51.8%
MEETING WITH THE BALLAD	Poland	Reality Show	8	19:59	53	12.2%	26.2%
MOST DANGEROUS POLICE CHASES	USA	Series–Docum.	10	21:26	23	11.8%	26.2%
L JAK LASKOWIK T JAK TEY	Poland	Comedy Show	5	20:01	44	11.3%	25.4%
FAMILIADA	Poland	Game Show	104	14:54	23	11.0%	44.7%
PANORAMA	Poland	News	386	21:44	23	10.4%	27.8%
BADZIEWIAKOWIE	Poland	Sitcom	17	18:55	27	10.2%	25.2%
UNINHABITANT ISLAND	Poland	Talk Show	7	15:59	46	10.1%	36.6%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL EU CUP POLAND–ENGLAND	Poland	Sport	08/09	20:02	110	30.5%	65.9%
FBAL EU CUP POLAND–SCHWEDEN	Poland	Sport	31/03	20:00	104	22.3%	51.6%
PAN WOLOGYJOWSKI	Poland	Movie	15/02	20:01	148	21.9%	47.0%
FLOOD P. II	Poland	Movie	08/02	20:00	133	20.9%	43.8%
KROLL	Poland	Movie	11/01	20:06	96	20.7%	44.6%
GALA PIOSENKI BIESIADNEJ	Poland	Reality Show	14/02	20:00	45	20.2%	37.6%
ZENON LASKOWIK	Poland	Comedy Show	21/02	20:01	45	19.6%	34.8%
LOVE OR LEAVE	Poland	Movie	16/08	19:58	116	19.2%	51.7%
FLOOD P. I	Poland	Movie	07/02	11:10	154	18.8%	53.6%
WIWAT JUBILAT	Poland	Comedy Show	28/11	15:38	44	18.2%	48.9%

Source: AGB Polska

POLSAT							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MIODOWE LATA	Poland	Series-Comedy	44	20:12	28	15.5%	36.9%
TEXAS RANGER	USA	Series-Action	36	20:05	42	14.6%	30.4%
GRACZYKOWIE	Poland	Series-Comedy	7	20:00	25	14.0%	30.6%
IDZ NA CALOSC	Poland	Series-Family	68	19:05	50	13.3%	32.9%
RODZINA ZASTEPCZA	Poland	Series-Comedy	21	20:00	25	12.7%	28.5%
SWIAT WEDLUG KIEPSKICH	Poland	Sitcom	22	20:01	24	12.4%	29.7%
POLICEMEN	Poland	Series-Comedy	11	20:55	47	12.1%	29.8%
PALOMA	Mexico	Ser.-Daily Soap	81	19:02	41	11.8%	29.0%
13 POSTERUNEK	Poland	Sitcom	40	20:00	27	11.7%	30.5%
NIEMIARYGODNE ALE PRAWDZIWE	USA	Documentary	7	21:09	21	11.1%	25.8%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
THE SPECIALIST	USA	Movie	19/04	20:01	102	24.2%	56.2%
BEYOND THE LAW	USA	Movie	22/02	21:00	94	23.7%	53.9%
SPEED	USA	Movie	04/10	20:00	107	22.7%	52.8%
RAMBO II	USA	Movie	25/01	21:00	90	21.9%	51.5%
UNDER SIEGE	USA	Movie	29/11	20:00	95	21.9%	47.2%
WROBIONY W SZMARAGDY	USA	Movie	23/02	20:35	91	21.8%	49.1%
INDEPENDENCE DAY	USA	Movie	08/11	20:00	132	21.7%	50.0%
HARD TO KILL	USA	Movie	26/04	20:01	90	21.4%	50.3%
NOWHERE TO RUN	USA	Movie	22/11	20:01	88	21.3%	45.7%
BOXING GOLOTA-FERGUSON	Poland	Sport	31/01	14:30	55	21.1%	48.6%

Source: AGB Polska

TVN							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ESMERALDA	Mexico	Daily Soap	50	18:01	42	9.1%	23.4%
MILLIONAIRES	UK	Game Show	68	20:02	34	8.3%	18.4%
FACTS	Poland	News	364	19:00	24	7.9%	24.1%
PAULINA	Mexico	Daily Soap	102	18:01	41	7.8%	30.2%
ROSALINDA	Mexico	Daily Soap	81	18:03	41	7.5%	25.4%
CAMILA	Mexico	Daily Soap	27	18:08	40	7.4%	19.9%
CRISTINA	Mexico	Daily Soap	135	19:35	42	6.7%	17.0%
MARIA ISABELA	Mexico	Daily Soap	125	19:31	21	5.6%	14.3%
POD NAPIECIEM	Poland	Talk Show	40	21:33	25	5.0%	12.0%
WIZJER TVN	Poland	Mag.-News+Ent.	57	17:33	27	4.7%	13.9%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ENTER THE DRAGON	USA	Movie	01/10	20:58	98	9.7%	26.9%
ERASER	USA	Movie	08/10	21:19	110	9.0%	26.2%
STRIPTease	USA	Movie	15/10	21:22	110	8.7%	25.8%
BEST OF THE BEST	USA	Movie	10/12	21:24	87	8.7%	24.2%
EXECUTIVE DECISION	USA	Movie	05/11	21:21	127	8.3%	26.6%
LAST MAN STANDING	USA	Movie	19/11	21:23	97	8.1%	23.7%
ZA BURTA	USA	Movie	03/05	20:01	107	7.7%	18.2%
POLICE ACADEMY IV	USA	Movie	03/10	14:30	84	7.5%	26.3%
FORCE 10 FROM NAVARONE	UK	Movie	27/04	20:05	121	7.4%	18.5%
THE WAR OF THE ROSES	USA	Movie	28/12	20:35	112	7.3%	17.6%

Source: AGB Polska

RTL 7							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NIGHT WITH THE VAMPIRE	Poland	Talk-Show	79	21:49	60	2.2%	6.6%
ZOOM	Poland	Mag.-News+Ent.	262	19:00	27	2.2%	6.4%
CONTRACT FOR MURDER	n.a.	Series-Action	4	21:48	44	1.6%	4.6%
EXTRA ZOOM	USA	Mag.-News+Ent.	50	19:00	28	1.5%	4.7%
DR BRUCKNER	Germany	Series-Medicine	15	21:40	49	1.4%	4.2%
7TH HEAVEN	USA	Series	33	15:45	43	1.4%	4.6%
COLUMBO	USA	Series	32	20:12	80	1.3%	3.2%
SEXPLOZJA	POLAND	Magazine	69	23:08	15	1.2%	5.5%
PSI FACTOR	USA	Series-Mystery	44	17:19	44	1.2%	4.4%
UNIVERSITY HOSPITAL	USA	Series	9	15:33	42	1.1%	3.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
TRUE LIES	USA	Movie	21/11	20:00	132	4.5%	9.8%
HARD TARGET	USA	Movie	27/06	20:00	91	4.1%	12.0%
MOTHER DOES NOT LET ME DIE	Germany	Movie	03/02	20:01	93	3.8%	8.4%
THE GOOD SON	USA	Movie	24/01	17:27	77	3.6%	8.0%
VOLCANO	USA	Movie	03/01	20:00	85	3.5%	7.1%
DEAD WISH V	USA	Movie	12/06	21:40	91	3.5%	9.8%
BELLA MAFIA	USA	Movie	25/01	20:00	82	3.2%	7.0%
BARB WIRE	USA	Movie	14/02	20:01	90	3.2%	6.0%
UNHOLLY MATRIMONY	USA	Movie	13/01	20:00	94	3.1%	6.8%
WILD RIVER	USA	Movie	10/10	20:00	103	3.1%	6.5%

Source: AGB Polska

NASZA TV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
COLUMBO	USA	Series-Action	32	20:12	80	1.1%	2.6%
VAN LOC	France	Series	6	15:25	86	1.0%	2.4%
SECOND CHANCES	USA	Series	13	21:54	45	1.0%	2.7%
ZYWIOLY ZIEMI	USA	Series-Docum.	6	16:20	23	1.0%	2.9%
CONTRACT FOR MURDER	USA	Series-Action	4	21:48	44	0.9%	2.7%
PIEKNI I SLAWNI-NASZA WIZYTA	Poland	Magazine	16	16:31	28	0.9%	2.5%
NIGHT WITH THE VAMPIRE	Poland	Talk Show	78	21:50	60	0.9%	2.6%
WINDMILLS OF THE GOD	USA	Series-Action	4	21:57	46	0.9%	2.5%
AMERICAN GOTHIC	USA	Series	6	21:49	43	0.8%	2.1%
BLYSK	USA	Series	4	22:10	47	0.8%	2.0%

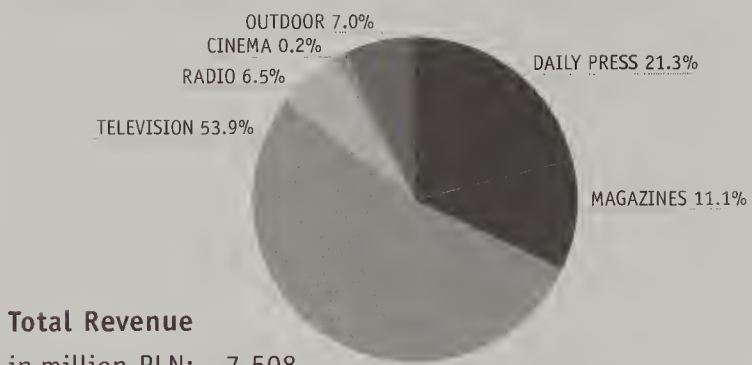
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
WINNETOU II	Ger./Yug.	Movie	28/02	14:39	102	3.3%	10.2%
WINNETOU III	Ger./Yug.	Movie	21/02	14:45	89	2.8%	7.9%
NARUSZENIE DYSCYPLINY	USA	Movie	06/01	20:01	89	2.5%	5.4%
VOLCANO	USA	Movie	03/01	20:00	84	2.4%	4.9%
WSTRZASY	USA	Movie	03/05	21:50	92	2.4%	8.3%
TRUE LIES	USA	Movie	21/11	20:00	132	2.4%	5.1%
GDYBYM WIEDZIALA	USA	Movie	14/02	23:20	87	2.3%	17.6%
PIRATES	Fra./Tun.	Movie	07/02	20:01	107	2.2%	4.4%
BARB WIRE	USA	Movie	14/02	20:01	89	2.2%	4.2%
WINNETOU I	Ger./Yug.	Movie	14/03	14:47	87	2.2%	6.1%

Source: AGB Polska

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million PLN)	7 508
Total adspend	(in million USD)	1 891
Total adspend	(in million EUR)	1 775
TV adspend	(in million PLN)	4 048
TV adspend	(in million USD)	1 020
TV adspend	(in million EUR)	957
TV adspend	in % of GDP	0.7
TV adspend	per capita (USD)	26.2

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

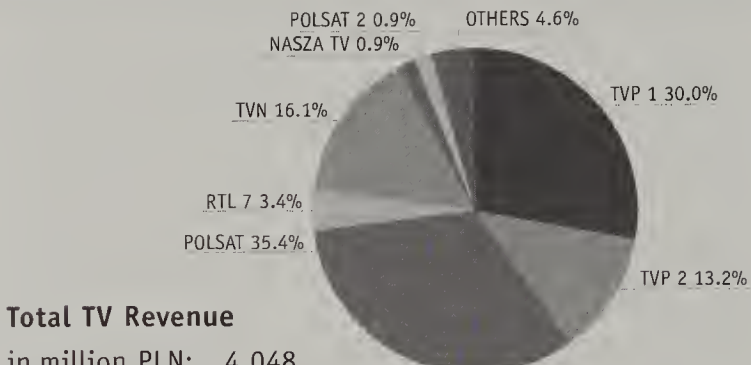


Total Revenue
in million PLN: 7 508
in million EUR: 1 775

TV ADVERTISING STATISTICS	
Total number of spots broadcast	440 439
Average spot length (in sec.)	30
Total number of advertisers	n.a.
Number of TV advertisers	816
Total number of advertised products	n.a.
Number products advertised on TV	4 352

Source: Expert Monitor, AGB Polska

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue
in million PLN: 4 048
in million EUR: 957

TOP 10 ADVERTISING FIGURES (GROSS)				
TV Advertising Sectors	3 Media*	Television	Spent in TV	Share of TV Expenditure
FOODS	1 440.0	1 194.0	82.9%	29.4%
PERSONAL BODY CARE	1103.7	776.7	70.4%	19.1%
BANKING/FINANCE	777.6	456.2	58.7%	11.2%
DETERGENTS	453.9	439.8	96.9%	10.8%
TRANSPORT/VEHICLES/TELECOMMUNICATION	984.4	382.5	38.9%	9.4%
ENTERTAINMENT&CULTURE	760.5	318.9	41.9%	7.9%
SPONSOR	n.a.	105.2	n.a.	2.6%
KIDS PRODUCTS	n.a.	69.6	n.a.	1.7%
SERVICES	n.a.	56.0	n.a.	1.4%
ANIMAL PRODUCTS	n.a.	41.6	n.a.	1.0%
HOUSE/OFFICE EQUIPMENT	283.8	34.2	12.1%	0.8%
OTHER	n.a.	173.0	n.a.	4.5%
TV Advertisers				
PROCTER & GAMBLE	n.a.	276.6	n.a.	6.8%
UNILEVER	n.a.	184.4	n.a.	4.6%
BENCKISER	n.a.	171.7	n.a.	4.2%
HENKEL	n.a.	92.9	n.a.	2.3%
COTY	n.a.	86.4	n.a.	2.1%
KRAFT JACOBS SUCHARD	n.a.	85.4	n.a.	2.1%
COCA COLA	n.a.	80.3	n.a.	2.0%
MASTERFOOD	n.a.	73.1	n.a.	1.8%
DANONE	n.a.	67.2	n.a.	1.7%
NESTLE	n.a.	57.0	n.a.	1.4%
OTHER	n.a.	2 873.0	n.a.	71.0%
Total (in million PLN)	6 971	4 048	58.1%	100.0%
Total (in million EUR)	1 648	957	58.1%	100.0%

Source: AGB Polska

*TV, Press, Radio

In 1999, two thematic channels emerged in Romania: Atomic TV, a music channel targeted at youngsters aged 15-24 and a well-known children’s channel – Fox Kids.

Despite the increasing competition, the TV scene is still dominated by three general interest channels. On one side, the public broadcaster – whose name has been changed from TVR to Romania 1 after its relaunch in September ‘99 – and on the other side, two major private channels: Pro TV and Antena 1.

In terms of audience, we have to consider two distinct levels: national and urban, relating to advertisers’ interests. National audience figures are mostly used by a special category of advertisers, having a national distribution of their products. At national level, the public channel – Romania 1 – has been able to maintain its leading position reaching 37% audience share. This was followed by Pro TV with 26% and Antena 1 with 18%. Audience performances at urban level are, however, becoming more important for two reasons: first, the majority of advertisers have urban distribution networks and secondly, the average time spent watching TV is significantly higher in urban areas. At this level, Pro TV holds the first position with 33% audience share, being followed by Antena 1 and Romania 1 with 25% and 17% of audience shares respectively.

The Pay-TV market has not noticeably altered since last year. HBO is the only actor and it will not have to face any competition in the near future. This year, HBO tripled its coverage and is now present in 70 cities and claims over 100 000 subscribers.

With respect to programming strategy, public TV is more oriented towards magazines, series and news: 70% of its programmes are local productions, while private channels concentrate mainly on series and films imported from USA but also include locally produced magazines. Audience results show that Romanian’s favoured TV genres are news, TV contests, live football and films. A very popular programme that managed to be in the leading position for over one year is “Surprise Surprise”, broadcasted by Romania 1. This entertainment magazine was launched in April 1998 as the Romanian version of a famous Spanish programme and reached over 30% of the adult population.

The era of telenovelas that began in 1997 fell this year. The audience saturation with soaps imported from Mexico, Argentina and Venezuela allowed a new programme to emerge: the “Bingomania” was born. This new Game Show also based on a Spanish format and named “Teleeurobingo Show” is broadcasted by Antena 1 and reaches over 20% of the adult population.

In 1999, the total gross media expenditure increased with approximately 30% and reached an amount of 268 million EUR.

TV share increased by 4 points from 67% to 71%. Press expenditure has gone up 2 points from 22% to 24%, whereas radio and outdoor hold marginal positions with 3% and 2% respectively. According to monitoring data, Pro TV has the largest ad market share with 42.1%, even though it has lost 8 share points in comparison with last year. Antena 1 improved its ad share with 2 points obtaining 25.2% whereas Romania 1 ad market share dropped from 16.5% in 1998 to 6.6 this year. The lack of performances in the advertising field was the reason why public TV management decided to set up a tender in order to entrust the management of its advertising space to a media sales house. IP Bucuresti won the tender and since November 1999 is the media partner of the public broadcaster.

Romania

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General Data

COUNTRY		ECONOMICS	
Land area (km ²)	238 391	GDP in billion ROL (at current prices)	521 736
Total population	22 546 000	GDP per capita in ROL (at current prices)	23 185 356
Number of households	7 806 787	Inflation rate in 1999 (in %)	45.8
Average household size	2.9	Value of ROL in Euro (EUR)	1 EUR = 16 284 ROL
In % of households/population equipped		Value of ROL in US-Dollar (USD)	1 USD = 15 321 ROL
Phone	45.0/15.6	Sources: National Commission for Statistics/IP Bucuresti database	
Mobile telephone subscribers	20.5/7.0		
PC's	n.a.		
Internet access	n.a.		
Internet user, last month	5.8/2.0		

TV OVERVIEW	
Total number of TV households (TVHH)	6 737 257
In % of all households	86.2
Numbers of channels received by 70% of the population	1
TV License-Fee cost per year	ROL 240 000.-/EUR 14.7

TV EQUIPMENT		TV DISTRIBUTION	
in % of TVHH		in % of TVHH	
Colour TV	72.1	Cable	passed 73.7 ¹
Multiset (homes with more than 1 TV set)	15.5		connected 51.3
VCR	14.2	Satellite	private dish/DTH 2.5
Teletext	29.8		collective dish/SMATV 0.8
Remote control	59.6	Terrestrial	analog 55.0
Sources: IMAS - Institute of Marketing and Polls, February 1999 / IP Bucuresti database			digital n.a.
			MMDS 45.0
		¹ Statistical Yearbook 2000 European Audiovisual Observatory	

TV SUBSCRIPTION			
Analog pay TV subscribers	1.5%	Digital TV subscribers	n.a.
Sources: IMAS - Institute of Marketing and Polls, February 1999			

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
ROMANIA 1*	1957	T, C	99.1%	Romanian	140	Generalist	L-F, Gvt., Adv.	IP Bucuresti
TVR 2	1957	T, C	52.3%	Romanian	140	Generalist	L-F, Gvt., Adv.	IP Bucuresti

*In September 1999 TVR has been relaunched and its name has been changed from TVR to Romania 1

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
PRO TV	1995	T, C	56.8%	Romanian	168	Generalist	Adv.	In-house
ANTENA 1	1993	T, C	59.9%	Romanian	168	Generalist	Adv.	In-house
TELE 7ABC	1994	T, C, S	51.8%	Romanian	168	Generalist	Adv.	In-house
PRIMA TV	1997	T, C	50.0%	Romanian	168	Generalist	Adv.	In-house
ACASA TV	1998	C	46.1%	Romanian	168	Old Movies,**	Adv.	In-house
ATOMIC TV	1999	C	39.0%	Romanian	168	Music	Adv.	In-house
FOX KIDS	1999	C	20.0%	Romanian	84	Cartoons	Adv.	In-house

Sources: IMAS - Institute of Marketing and Polls, February 1999 / IP Bucuresti database

**Sport,Telenovelas

DOMESTIC CHANNELS (REGIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TVR CLUJ	1990	T, C	n.a.	Romanian	n.a.	Generalist	Gvt., Adv.	In-house
TVR IASI	1991	T, C	n.a.	Romanian	n.a.	Generalist	Gvt., Adv.	In-house
TVR TIMISOARA	1994	T, C	n.a.	Romanian	n.a.	Generalist	Gvt., Adv.	In-house
TVR CRAIOVA	1999	T, C	n.a.	Romanian	n.a.	Generalist	Gvt., Adv.	In-house

Sources: IMAS-IP Bucuresti database

DOMESTIC CHANNELS (REGIONAL PRIVATE)							
Channels		Diffusion	Tech. Pen.	Language	h/week	Programming	Revenue
3 TV (DEVA)		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
CANAL PLUS (BRASOV)		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
RTV (ARAD)		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
RTV (SIBIU)		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
SYMBOL (BACAU)		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
TV ETALON (RM. VALCEA)		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
TV GALATI		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
TV VALCEA 1		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
TV VALCEA 2		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
TELE M (P. NEAMT)		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
SIGMA		T	n.a.	Romanian	n.a.	Generalist	n.a.
SUPER NOVA		n.a.	8.1%	Romanian	n.a.	Generalist	n.a.
57 PLUS		C	n.a.	Romanian	n.a.	Generalist	n.a.
C 41		T	n.a.	Romanian	n.a.	Generalist	n.a.
CBN		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
EUROPA NOVA		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
P+		n.a.	n.a.	Romanian	n.a.	Generalist	n.a.
RCS		C	n.a.	Romanian	n.a.	Generalist	n.a.
RTT		T	n.a.	Romanian	n.a.	Generalist	n.a.
TELE M		T	n.a.	Romanian	n.a.	Generalist	n.a.
TELE UNIV. CRAIOVA		T	n.a.	Romanian	n.a.	Generalist	n.a.
TV NEPTUN		T	n.a.	Romanian	n.a.	Generalist	n.a.

Sources: IMAS-Institute of Marketing and Polls, February 1999/IP Bucuresti database

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
NBC	Private	C, S	n.a.	English	Generalist	Adv.
TV 5	Public	C, S	30.7%	French	Generalist	L-F, Adv.
TVE	Public	C, S	n.a.	Spanish	Generalist	L-F, Adv.
Dubai	n.a.	C, S	n.a.	Arabian	Generalist	L-F, Adv.
3 SAT	Public	C, S	n.a.	German	Generalist	L-F
EURO NEWS	Private	C, S	37%	English	News	Adv.

Sources: IMAS-Institute of Marketing and Polls, February 1999/IP Bucuresti database

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
CNN	Private	C, S	19%	English	News	Adv.
BLOOMBERG TV	Private	C, S	n.a.	English	News	Adv.
BBC WORLD	Private	C, S	8.8%	English	News	Adv.
CNBC	Private	C, S	n.a.	English	Bussiness	Adv.
VH-1	Private	C, S	n.a.	English	Music	Adv.
MTV	Private	C, S	32.0%	English	Music	Adv.
MCM	Private	C, S	n.a.	French	Music	Adv.
EURO SPORT	Private	C, S	46.0%	Romanian	Sport	Adv.
ARTE	Public	C, S	2.7%	French/German	Cultural	L-F, Adv.
CARTOON NETWORK/TNT	Private	C, S	36.0%	English	Cartoons/Old Movies	Adv.
DISCOVERY	Private	C, S	37.0%	English/sub.Romanian	Documentaries	Adv.
ANIMAL PLANET	Private	C, S	n.a.	English/sub.Romanian	Documentaries	Adv.
NATIONAL GEOGRAPHIC	Private	C, S	n.a.	English	Documentaries	Adv.
FASHION TV	Private	C, S	n.a.	French	Fashion	Adv.
TRAVEL CHANNEL	Private	C, S	n.a.	English	Travel info.	Adv.

Sources: IMAS–Institute of Marketing and Polls, February 1999/IP Bucuresti database

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
FRANCE 2	Public	C, S	n.a.	French	Generalist	L-F, Adv.
M6	Private	C, S	n.a.	French	Generalist	Adv.
TF1	Private	C, S	n.a.	French	Generalist	Adv.
MUZZIK	Private	C, S	n.a.	French	Music	Adv.
ZDF	Public	C, S	n.a.	German	Generalist	L-F, Adv.
PRO 7	Private	C, S	39.0%	German	Generalist	Adv.
RTL	Private	C, S	40%	German	Generalist	Adv.
RTL 2	Private	C, S	n.a.	German	Generalist	Adv.
SAT 1	Private	C, S	33.0%	German	Generalist	Adv.
VOX	Private	C, S	n.a.	German	Generalist	Adv.
VIVA	Private	C, S	n.a.	German	Music	Adv.
DSF	Private	C, S	14.0%	German	Sport	Adv.
ONYX	Private	C, S	n.a.	German	Music	Adv.
RAI 1	Public	C, S	39.0%	Italian	Generalist	L-F, Adv.
RAI 2	Public	C, S	n.a.	Italian	Generalist	L-F, Adv.
RAI 3	Public	C, S	n.a.	Italian	Generalist	L-F, Adv.
STAR	Private	C, S	n.a.	Turkish	Generalist	Adv., Spon.
SHOW	Private	C, S	n.a.	Turkish	Generalist	Adv., Spon.
KANAL 1	Public	C, S	n.a.	Bulgarian	Generalist	L-F, Adv.
EFIR 2	Public	C, S	n.a.	Bulgarian	Generalist	L-F, Adv.
MTV 1	Public	C, S	n.a.	Hungarian	Generalist	L-F, Adv.
MTV 2	Public	C, S	n.a.	Hungarian	Generalist	L-F, Adv.
TV2	Private	C, S	n.a.	Hungarian	Generalist	Adv.
TV3	Private	C, S	n.a.	Hungarian	Generalist	Adv.
RTP	Private	C, S	n.a.	Portuguese	Generalist	Adv.

Sources: AGB Data Research

PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue
HOME BOX OFFICE	1998	C	100.000	Romanian	116	Movie	80 000	Sub.

Sources: AGB Data Research

Viewing Patterns

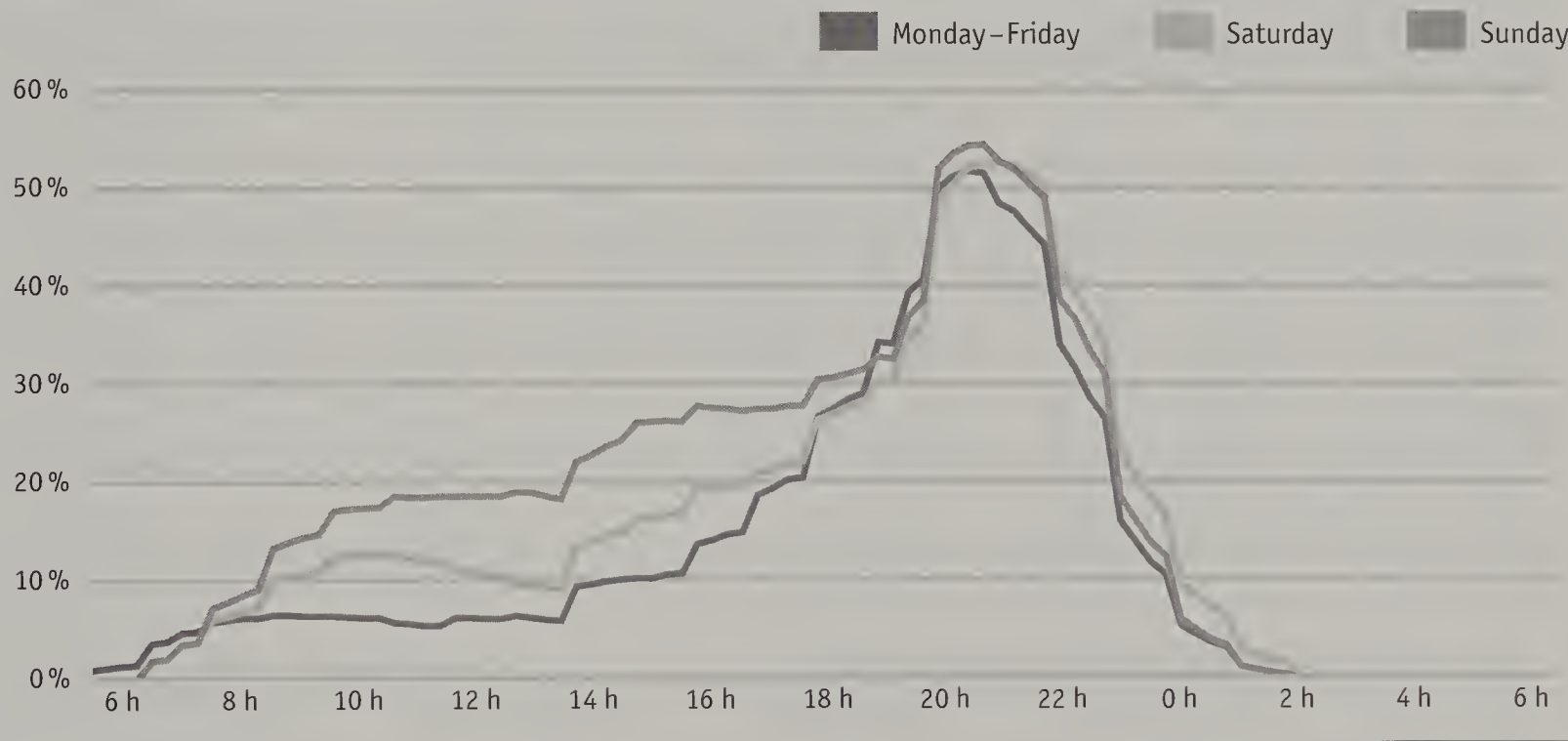
AUDIENCE MEASUREMENT	
Name of the Service and Institute:	AGB Data Research
Panel/Sampling Size	780 households
Instrument used (people-meter, telefon, face-to-face)	People-meter*, diary
Population size in 000	
Individuals 6+	19 031
Adults 15+	16 401
Main Purchase Responsibles	6 350
Young Adults 15-44	9 442
Children 6-14	2 631

Sources: AGB Data Research

*only in Bucarest

TOTAL TV RATING 1999

Adults Age: 15+

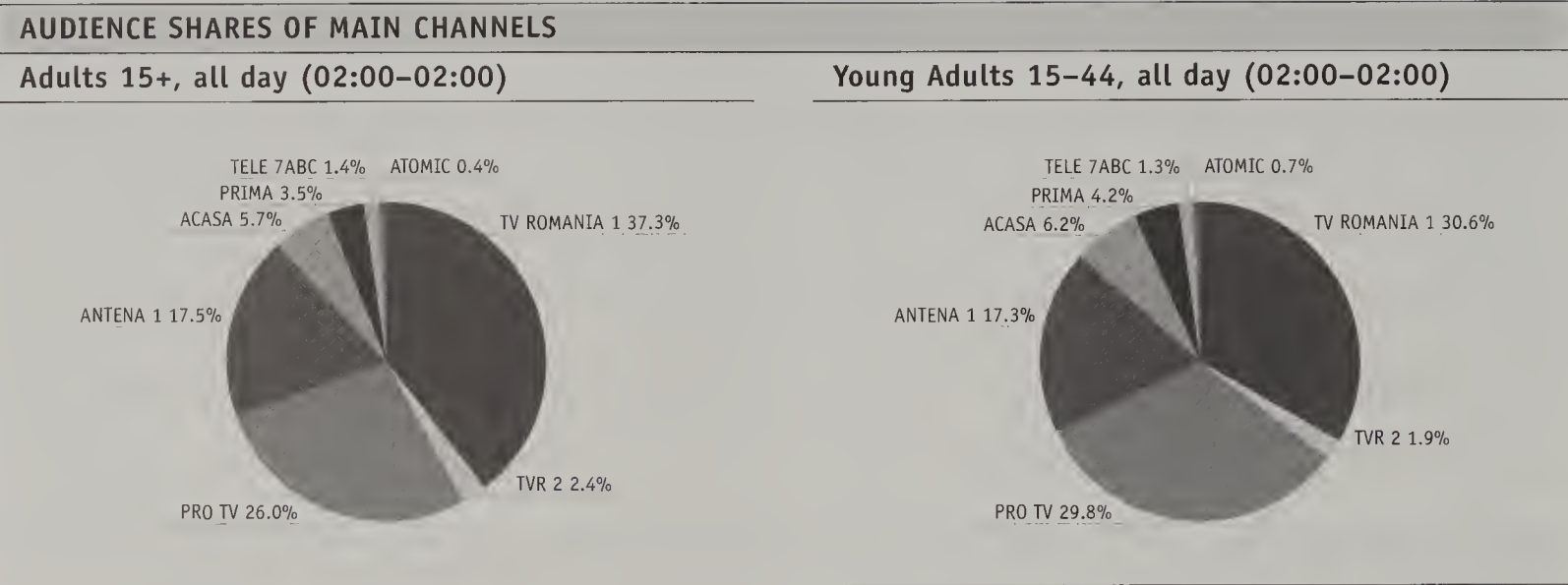


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)								
	Adults 15+		Children 6-14		Young Adults 15-44		Main Purchase Responsibles	
	1998*	1999	1998*	1999	1998*	1999	1998*	1999
Daily reach in %	82.9	83.1	75.9	76.5	81.3	81.4	88.4	88.1
Viewing time per Viewer	253	257	214	216	239	239	284	289
Viewing time per Individual	210	214	163	166	194	195	251	255

Source: AGB Data Research

*1998: Apr-Dec; People meter have been implemented in april 1998

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00								
	Adults 15+		Young Adults 15–44		Children 6–14		Main Purchase Responsibles	
	1998*	1999	1998*	1999	1998*	1999	1998*	1999
TV Romania 1	43.9%	37.3%	37.4%	30.6%	36.2%	33.4%	44.1%	38.8%
TVR 2	3.6%	2.4%	2.6%	1.9%	3.0%	2.0%	3.9%	2.8%
PRO TV	25.2%	26.0%	29.9%	29.8%	27.8%	25.4%	23.7%	24.4%
Antena 1	14.7%	17.5%	14.8%	17.3%	11.4%	12.5%	15.6%	18.0%
Acasa	3.0%	5.7%	3.2%	6.2%	2.9%	6.9%	3.7%	6.2%
Prima	3.1%	3.5%	3.7%	4.2%	3.6%	3.6%	3.0%	3.2%
Tele 7abc	0.9%	1.4%	0.9%	1.3%	0.9%	0.8%	1.1%	1.4%
Atomic	n.a.	0.4%	n.a.	0.7%	n.a.	0.7%	n.a.	0.2%

*1998: Apr–Dec

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 15+		Young Adults 15–44		Children 6–14		Main Purchase Responsibles	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	7–19 h	19–23 h	7–19 h	19–23 h	7–19 h	19–23 h	7–19 h	19–23 h
TV Romania 1	33.1%	42.9%	26.7%	35.8%	28.9%	40.4%	34.1%	44.8%
TVR 2	3.6%	1.3%	2.8%	1.1%	2.8%	0.8%	4.2%	1.5%
PRO TV	25.5%	26.4%	28.5%	30.9%	23.8%	27.2%	24.3%	24.2%
Antena 1	19.7%	15.2%	18.8%	15.6%	12.7%	11.9%	20.8%	15.1%
Acasa	6.2%	5.4%	7.1%	5.7%	5.9%	8.5%	6.6%	6.0%
Prima	3.8%	2.9%	4.3%	3.7%	3.3%	4.0%	3.6%	2.6%
Tele 7abc	1.2%	1.3%	1.2%	1.1%	0.8%	0.7%	1.3%	1.4%
Atomic	0.7%	0.1%	1.4%	0.2%	1.1%	0.2%	0.3%	0.1%

Source: AGB Data Research

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
SMITHSONIAN FESTIVAL	Romania	TV Romania 1	Magazine-Cultural	20:31	26/06	32.4%	61.7%
SORPRESAS SORPRESAS	Spain	TV Romania 1	Variety Show	20:33	20/11	32.2%	60.6%
FBAL ROMANIA-HUNGARY	Romania	TV Romania 1	Sport	20:43	05/06	31.8%	67.0%
JOURNAL	Romania	TV Romania 1	News	20:00	22/01	30.8%	52.8%
METALLICA CONCERT PREVIEW	Romania	TV Romania 1	Magazine-Musical	20:32	05/06	30.7%	60.4%
FBAL LIECHTENSTEIN-ROMANIA	Romania	TV Romania 1	Sport	20:26	09/10	30.1%	57.8%
JOURNAL SPECIAL EDITION	Romania	TV Romania 1	News	20:36	22/01	29.0%	50.3%
7 DAYS IN ROMANIA	Romania	TV Romania 1	Magazine	20:34	07/03	28.8%	50.8%
CHARMED	USA	TV Romania 1	Series-Mysterious	20:30	10/07	27.7%	53.6%
MR. AND MRS. SMITH	USA	TV Romania 1	Series-Crime	20:31	02/01	27.3%	49.3%
YEHUDI MENUHIN REMEMBER	Romania	TV Romania 1	Documentary	20:35	12/03	27.1%	49.4%
SUNDAY SPORTS	Romania	TV Romania 1	Sport-News	20:30	04/04	26.8%	46.9%
PRESIDENT'S MESSAGE*	Romania	TV Romania 1	News	23:18	31/12	26.6%	48.7%
KIKI RIKI MIKI IN SPACE	Romania	TV Romania 1	Children	21:00	31/12	25.9%	45.7%
SPIRITUAL LIFE	Romania	TV Romania 1	Magazine-Religious	20:42	29/04	25.9%	46.4%
FOOTBALL INFO	Romania	TV Romania 1	Sport-News	20:23	21/11	25.8%	42.2%
METALLICA CONCERT PRESENT.	Romania	TV Romania 1	Magazine-Musical	20:32	10/06	25.8%	52.0%
CANDID CAMERA-SHOCK TROUP	USA	TV Romania 1	Reality Show	20:31	03/01	25.7%	47.7%
MISTERIES CHAMBER	Romania	TV Romania 1	Game Show	20:47	02/09	25.5%	48.8%
PREY	USA	TV Romania 1	Series-Mysterious	20:32	06/02	25.5%	45.0%

*FOR THE NEW YEAR

TOP 10 MOVIES							
Title	Land	Channel	Start.Time	Date	Audience	Share	
FAITHFUL	USA	TV Romania 1	20:33	11/04	23.7%	48.2%	
MOESES	USA	TV Romania 1	20:32	10/04	23.4%	47.7%	
ODYSSEY	USA	TV Romania 1	20:37	01/01	22.5%	46.0%	
MIA PER SEMPRE	Italy	TV Romania 1	20:56	07/02	21.4%	44.6%	
SECRETS OF THE HEART	USA	TV Romania 1	20:59	16/05	21.1%	45.6%	
MA FEMME ME QUITTE	France	TV Romania 1	20:56	24/01	21.0%	42.0%	
MIA PER SEMPRE	Italy	TV Romania 1	21:04	14/02	20.8%	46.5%	
THE CHINESE BOX	USA	TV Romania 1	20:56	31/01	19.6%	40.6%	
HORNBLOWER	United Kingdom	TV Romania 1	21:01	06/06	19.6%	42.5%	
AU PETIT BONHEUR	France	TV Romania 1	20:41	24/08	19.5%	43.0%	

TOP 10 SPORT EVENTS							
Title		Channel	Start.Time	Date	Audience	Share	
FBAL ROMANIA-HUNGARY		TV Romania 1	20:43	05/06	31.8%	67.0%	
FBAL LIECHTENSTEIN-ROMANIA		TV Romania 1	20:26	09/10	30.1%	57.8%	
FBAL STEAUA BUCHAREST-SLAVIA PRAGUE		TV Romania 1	19:53	09/12	24.1%	46.6%	
FBAL ROMANIA-SLOVAKIA		TV Romania 1	20:21	27/03	22.7%	48.1%	
FBAL ROMANIA-ISRAEL		TV Romania 1	18:53	10/03	22.7%	47.6%	
FBAL UEFA CUP LASK LINZ-STEUA BUCHAREST		TV Romania 1	18:52	28/09	21.2%	51.6%	
FBAL UEFA CUP DINAMO BUCHAREST-BENFICA LISABON		TV Romania 1	20:42	30/09	20.6%	48.2%	
FBAL ROMANIA-PORTUGAL		TV Romania 1	20:39	08/09	20.5%	51.7%	
FBAL SLOVAKIA-ROMANIA		TV Romania 1	21:12	04/09	20.5%	49.6%	
FBAL ROMANIA-BELGIUM		TV Romania 1	20:30	28/04	19.7%	44.4%	

Source: AGB Data Research

Top Programmes Channel by Channel

TV ROMANIA 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
SURPRISE, SURPRISE	Spain	Variety Show	26	20:30	120	28.2%	57.4%
JOURNAL	Romania	News	362	20:00	45	26.0%	49.8%
7 DAYS IN ROMANIA	Romania	Magazine–Politics	36	21:00	30	25.6%	47.4%
SMITHSONIAN FESTIVAL	Romania	News	4	21:00	5	23.1%	48.3%
JOURNAL SPECIAL EDITION	Romania	News	120	20:45	15	22.8%	46.6%
MISTERIES CHAMBER	Romania	Game Show	44	20:45	15	22.4%	46.4%
PREY	USA	Series–Mysterious	13	20:30	45	21.3%	43.5%
JUST ONE MORE WORD	Romania	Magazine–Educ.	66	19:55	5	20.6%	43.8%
TWO GUYS, A GIRL*	USA	Sitcom	10	21:00	30	20.5%	39.3%
SATURDAY NEWS	Romania	Comedy Show	16	21:30	30	19.7%	40.9%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL ROMANIA–HUNGARY	Romania	Sport	05/06	20:43	149	31.8%	67.0%
FBAL LIECHTENSTEIN–ROMANIA	Romania	Sport	09/10	20:26	119	30.1%	57.8%
YEHUDI MENUHIN REMEMBER	Romania	Documentary	12/03	20:35	9	27.1%	49.4%
PRESIDENT’S MESSAGE**	Romania	News	31/12	23:18	13	26.6%	48.7%
KIKI RIKI MIKI IN SPACE	Romania	Children	31/12	21:00	60	25.9%	45.7%
FBAL UEFA CUP***	Romania	Sport	09/12	19:53	127	24.1%	46.6%
FAITHFUL	USA	Movie	11/04	20:33	91	23.7%	48.2%
SORPRESAS, SORPRESAS****	Spain	Variety Show	31/12	22:00	240	23.5%	46.5%
DIVERTIS SHOW*****	Romania	Comedy Show	02/01	21:20	73	23.4%	48.6%
CHRISTMAS CAROLS	Romania	Music	24/12	21:03	33	22.3%	42.6%

Source: AGB Data Research

*AND A PIZZA PLACE, **FOR THE NEW YEAR, *** STEAUA BUCHAREST–SLAVIA PRAGU, ****NEW YEAR’S SPECIAL

PRO TV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FX	USA	Series–Action	13	20:30	60	15.2%	28.8%
ONCE A THIEF	USA	Series–Action	7	20:00	60	15.1%	27.5%
ALLY MCBEAL	USA	Series–General	30	20:00	60	15.0%	28.3%
POLICE ACADEMY	USA	Series–General	9	20:00	60	14.5%	27.9%
VACATION ON PRO TV	Romania	Comedy Show	13	20:00	60	14.5%	25.6%
NIKITA	USA	Series–Action	7	20:00	60	14.2%	27.1%
EMERGENCY ROOM	USA	Series–General	6	20:30	60	12.9%	25.7%
PRO TV NEWS	Romania	News	270	19:30	60	12.7%	29.2%
MELROSE PLACE	USA	Series–General	46	20:30	60	12.7%	25.4%
THE CROW	USA	Series–Mysterious	22	20:30	60	12.7%	26.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
SHE FOUGHT ALONE	USA	Movie	06/01	20:39	101	16.9%	33.8%
SWEET DREAMS	USA	Movie	13/01	20:40	99	16.7%	33.5%
ANOTHER KIND OF JOURNAL	Romania	News	11/12	19:52	21	15.9%	31.8%
FUNNY FARM	USA	Movie	01/02	20:29	101	15.4%	30.2%
OUT OF DARKNESS	USA	Movie	03/02	20:36	96	15.3%	31.9%
CURLY SUE	USA	Movie	21/03	21:09	105	15.0%	34.8%
KING OF THE HILL	USA	Movie	07/02	21:00	104	14.9%	32.0%
THE PACKAGE	USA	Movie	06/12	20:12	108	14.9%	29.0%
DAYS OF THUNDER	USA	Movie	31/01	20:56	107	14.7%	31.3%
EVEN COWGIRLS GET THE BLUES	USA	Movie	04/01	20:27	100	14.6%	28.5%

Source: AGB Data Research

ANTENA 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
TELEEUBINGO SHOW	Romania	Game Show	53	20:00	180	12.0%	28.4%
HURACAN	Mexico	Daily Soap	79	18:00	60	8.6%	26.3%
I WILL NEVER FORGET YOU	Mexico	Daily Soap	69	17:30	90	8.2%	28.2%
SUNDAY AT HOME	Romania	Magazine-Entert.	47	14:00	240	8.1%	30.0%
OBSERVATOR	Romania	News	360	19:00	60	7.5%	20.0%
LABOUR FORCE	Romania	Series-Sitcom	5	20:00	60	7.2%	16.0%
AIR AMERICA	USA	Series-Action	17	21:00	60	6.9%	14.3%
THE FAMILY ON HOLIDAY	Romania	Magazine-Entert.	4	13:00	180	6.9%	29.4%
TWO	USA	Series-Action	16	21:00	60	6.9%	14.0%
CAMILA	Mexico	Daily Soap	90	17:30	90	6.8%	23.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
CU LAUTRAII DUPA MINE SI CU BA	Romania	Comedy Show	01/01	02:25	11	10.3%	26.0%
FBAL STEAUA BUCH.-DINAMO BUCH.		Sport	24/10	16:48	130	10.2%	35.4%
COMEDY PARADE	Romania	Comedy Show	01/12	21:06	61	10.0%	20.0%
DESPERADO	USA	Movie	01/09	20:06	109	9.9%	19.4%
BLIND DATE	USA	Movie	30/11	20:10	110	9.5%	17.3%
WORLD'S HISTORY AS A COUPLE	Romania	Comedy Show	01/01	02:00	16	9.4%	23.6%
FIRST KNIGHT	USA	Movie	28/12	20:07	142	9.3%	17.6%
NU ADUCE ANUL CE ADUC	Romania	Comedy Show	01/01	02:51	9	9.2%	23.5%
JUMANJI	USA	Movie	07/12	20:07	113	8.9%	17.3%
HELLBOUND	USA	Movie	24/11	20:06	110	8.8%	16.8%

Source: AGB Research

PRIMA							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MARIA MERCEDES	Mexico	Daily Soap	131	15:00	45	2.6%	16.0%
BODYGUARD	USA	Series-Action	12	21:00	60	1.8%	4.4%
CANDID CAMERA	USA	Comedy Show	227	19:00	30	1.3%	3.3%
JUST SHOOT ME	USA	Sitcom	46	21:00	30	1.3%	3.6%
SILK STALKINGS	USA	Series-Crime	99	19:00	60	1.3%	3.1%
FOCUS 16	Romania	News	47	16:00	10	1.3%	7.4%
KOMISSAR REX	Germany	Series-Crime	66	20:30	60	1.3%	3.0%
FOCUS 18	Romania	News	360	18:00	30	1.2%	4.3%
VIPER	USA	Series-Action	103	19:00	60	1.2%	3.1%
FOCUS PLUS	Romania	News	335	22:30	30	1.2%	4.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
CROCODIL DUNDEE	Australia	Movie	09/01	20:00	96	4.5%	8.1%
CROCODIL DUNDEE II	Australia	Movie	23/01	20:00	115	4.5%	8.3%
LAST WARRIOR	USA	Movie	05/02	20:31	95	3.5%	6.6%
LOVE KILLS	USA	Movie	15/01	20:24	87	3.1%	5.9%
INTO THE NIGHT	USA	Movie	29/03	20:27	112	2.6%	5.3%
EIGER SECTION	USA	Movie	14/03	20:01	131	2.5%	4.8%
SOMEBODY HAS TO SHOT*	USA	Movie	07/03	20:00	106	2.4%	4.3%
SCARFACE	USA	Movie	13/03	20:02	185	2.4%	4.9%
ICE RUNNER	USA	Movie	21/02	20:03	119	2.3%	4.4%
THE LAST HIT	USA	Movie	26/02	20:50	98	2.2%	4.7%

Source: AGB Research

*THE PICTURE

ACASA							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ROSALINDA	Mexico	Daily Soap	33	17:30	60	4.6%	17.5%
FOR YOUR LOVE	Mexico	Daily Soap	12	17:30	60	4.5%	15.9%
THE LIE	Mexico	Daily Soap	94	21:15	60	4.4%	9.2%
MUÑECA BRAVA	Argentina	Daily Soap	234	20:30	60	4.1%	9.1%
LEZ CLARITA	Mexico	Daily Soap	35	16:30	60	3.9%	19.9%
ANGELA	Mexico	Daily Soap	35	18:30	60	3.6%	10.5%
LAZOS DE AMOR	Mexico	Daily Soap	100	21:15	60	3.3%	7.6%
SCREEN SONG	USA	Children	8	20:15	10	3.0%	5.6%
MILADY	Argentina	Daily Soap	120	22:00	45	2.6%	7.7%
THE PRECIOUS ONE	Mexico	Daily Soap	91	16:00	60	2.5%	15.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
LITTLE LULU	USA	Cartoon	11/10	20:21	7	5.4%	10.7%
THE ELDERLY FROM PARROTS CITY	USA	Cartoon	06/10	20:21	7	4.2%	8.5%
PANIC AMONG BIRDS	USA	Cartoon	18/10	20:21	7	4.2%	7.9%
THE STATE OF LONELY STAR	USA	Cartoon	20/10	20:21	7	4.1%	7.7%
HOT DAYS	USA	Cartoon	01/10	20:20	7	3.8%	7.5%
DICK WHITTINGTON'S CAT	USA	Cartoon	05/10	20:22	7	3.8%	7.5%
A BOY AND A DOG	USA	Cartoon	12/10	20:20	9	3.8%	7.3%
FIT TO DROP	USA	Cartoon	14/09	20:21	8	3.6%	7.1%
BLUE ANGELS' SONG	USA	Cartoon	24/12	17:00	24	3.3%	13.3%
MOLLY THE LITTLE COW*	USA	Cartoon	28/10	20:12	7	3.0%	5.6%

Source: AGB Research

ATOMIC							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FREE STYLE	Romania	Magazine-Inform.	11	10:15	15	0.3%	1.9%
ROMANIAN TOP 100	Romania	Magazine-Music	39	11:00	120	0.2%	1.8%
TALES	Romania	Documentary	42	12:30	30	0.2%	1.5%
CYBERNET	n.a.	n.a.	44	11:30	30	0.2%	0.9%
ADRENALIZE	n.a.	n.a.	40	13:00	30	0.1%	1.1%
RACTOR	Romania	News	451	14:00	20	0.1%	0.6%
KLUMEA	Romania	Magazine-Music	31	14:00	120	0.1%	0.8%
LONDON TOWER	Romania	Magazine-Music	40	16:00	60	0.1%	0.8%
ATOMIC CINEMA	Romania	Magazine-Cinema	54	22:00	30	0.1%	0.4%
SOUTH PARK	USA	Cartoon	24	22:30	30	0.1%	0.3%

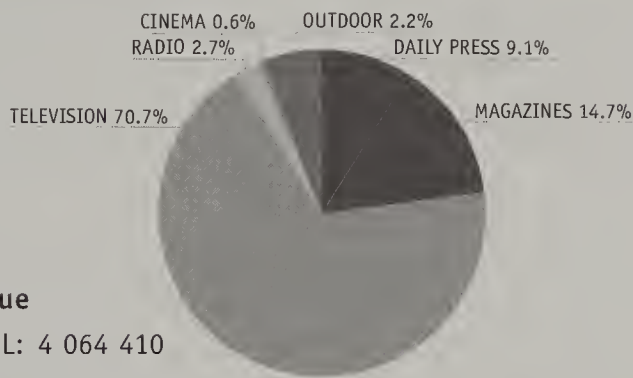
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
ATOMIX-SPECIAL EDITION	Romania	Music	03/05	15:52	361	0.3%	0.8%
CONCERT BJORK	n.a.	Music	13/06	21:59	54	0.3%	0.8%
CONCERT KD LANG	n.a.	Music	20/06	22:06	59	0.2%	0.6%
CONCERT ARAS	Romania	Music	21/11	21:31	68	0.2%	0.4%
CONCERT SPACE	n.a.	Music	30/05	22:01	57	0.1%	0.2%
CONCERT TRIBAL GATHERING 98	n.a.	Music	22/08	21:56	58	0.1%	0.2%
CONCERT NIRVANA	n.a.	Music	01/10	23:59	88	0.1%	1.4%
NEW YEAR'S PROGRAM	Romania	Music	31/12	19:02	418	0.1%	0.2%
CONCERT THE CORRS	n.a.	Music	11/04	21:29	60	0.1%	0.2%
UTOPIA	USA	Movie	03/04	23:33	87	0.0%	0.4%

Source: AGB Data Research

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million ROL)	4 064 410
Total adspend	(in million USD)	267
Total adspend	(in million EUR)	250
TV adspend	(in million ROL)	2 872 251
TV adspend	(in million USD)	187
TV adspend	(in million EUR)	176
TV adspend	in % of GDP	0.55
TV adspend	per capita (USD)	8.3

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

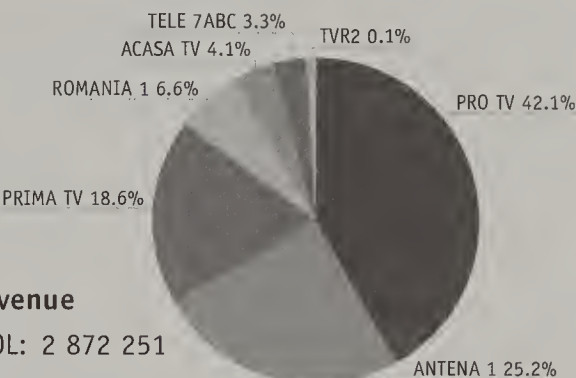


Total Revenue
in million ROL: 4 064 410
in million EUR: 250

TV ADVERTISING STATISTICS	
Total number of spots broadcast	250 192
Average spot length (in sec.)	30
Total number of advertisers	2 951
Number of TV advertisers	794
Total number of advertised products	4 403
Number products advertised on TV	1 268

Source: AC Nielsen Research

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue
in million ROL: 2 872 251
in million EUR: 176

Source: AC Nielsen Research

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	2 Media*	Television	Spent in TV	Share of TV Expenditure
TELEPHONE LINE SERVICES	514 647	492 389	95.7%	17.1%
LAUNDRY DETERGENTS	234 284	226 086	96.5%	7.9%
TELECOMMUNICATION SERVICES	362 888	226 056	62.3%	7.9%
BEERS	153 399	127 419	83.1%	4.4%
SHAMPOOS	107 026	104 533	97.7%	3.6%
COFFEE	101 559	92 391	91.0%	3.2%
CARBONATED SOFT DRINKS	96 286	89 961	93.4%	3.1%
NEWSPAPERS & MAGAZINES	88 298	75 475	85.5%	2.6%
BANKS/CREDIT CARDS	87 076	43 966	50.5%	1.5%
TV&RADIO STATIONS	101 488	27 263	26.9%	0.9%
OTHER	1 991 471	1 366 714	68.6%	47.6%
TV Advertisers				
PROCTER&GAMBLE	380 009	372 152	97.9%	13.0%
UNILEVER	209 340	195 829	93.5%	6.8%
COTY	112 895	108 567	96.2%	3.8%
MOBIFON	149 985	108 197	72.1%	3.8%
MOBIL ROM	150 569	103 980	69.1%	3.6%
S.T. CENTER	98 907	98 903	100%	3.4%
WORD PHONE ROMANIA	102 708	93 090	90.6%	3.2%
COCA COLA	74 023	71 649	96.8%	2.5%
YNES	71 654	70 782	98.8%	2.5%
HENKEL	60 873	56 118	92.2%	2.0%
Other	2 427 459	1 592 984	65.6%	55.5%
Total (in million ROL)	3 838 422	2 872 251	74.8	100.0%
Total (in million EUR)	236	176	74.8	100.0%

Source: AC Nielsen Research

*TV and Press

1999 began with the television industry in crisis, still suffering the effects of the economic fall-out of the previous August. With bankruptcy proceedings hanging over both national channels, and television advertising revenues reduced to as little as 20% of pre-crisis levels, all major channels were facing very severe financial restrictions.

This fragile environment would become a political battleground during the next twelve months, in which financial vulnerability would be exploited and higher ideals sacrificed for political ends. During the period of the parliamentary elections in December 1999 and the presidential elections in March 2000, the media in Russia was once again used with sophistication, subtlety, and at times crudeness and brutality as a potent political tool of the state.

In April 1999, all regional television and radio companies were brought under the central control of the state-owned EPTK, in a move which passed financial and management control out of the hands of regional government into the direct control of the former VGTRK.

To date, the Ministry has exercised its powers most extensively in the control of political programming and the media's role in the election process. In September, it temporarily removed St Petersburg TV from the air, for a news report which "violated laws on mass media and insulted the Russian flag".

ORT and one-time presidential hopeful Moscow Mayor Luzhkov's TV Centre received further warnings during the next six months, which caused both broadcasters to lose their automatic right to renew their broadcast licences on expiry, and resulted in an open tender for the licences in May 2000, creating the potential for major change in the broadcast landscape.

Not only through regulation did the state seek to control the media. Financial pressure was put on Media Most and its flagship channel NTV by the state bank's demands for debt repayment relating to Media Most's digital DTH service NTV+. In January 2000 Media Most sold a 4.5% stake in both NTV and THT to a US mutual fund, and a further stake in the holding company to Gazprom, increasing the gas mono-poly's shareholding in the station to over 35%. Despite its financial vulnerability, Media Most was able to purchase 22% of troubled Central European media owner CME in Oct. 1999.

Russia's second largest independent network TV6 Moscow also saw a change in ownership during 1999 as founder and chairman Eduard Sagalayev sold his 37.5% shareholding in the independent network to Boris Berezovskii, increasing the oligarch's stake in the channel to over 70%.

During 1999, ORT conducted its own advertising sales, despite the prospect of a much-heralded News Corporation/Logovaz sales house, which was launched but failed to secure a contract with ORT, and closed before the year ended. In a flurry of activity at the end of 1999,

Video International acquired the exclusive rights to sell ORT airtime in a new five year agreement, strengthening the sales house's ties with the Russian state and distancing it from NTV and Media Most, whose contract with Video International expired at the end of 1999.

In 2000, Video International is responsible for the sale of airtime on ORT, RTR, TV6, CTC, and leading regional channels, accounting for well over two-thirds of all television advertising revenues.

In January 2000, Media Most established its own sales house, Smart Media, responsible for the sale of airtime on NTV, THT, and NTV Plus satellite channels.

After a difficult year of mergers and closures, advertising agencies in 2000 will be satisfied with maintaining their existing clients' budgets. There is scope for limited growth in revenues from Russian advertisers and multinationals making a cautious return to Russia after President Putin's election in March. Expert estimates of total television advertising revenues during 1999 record a figure of under \$200 million, ten times less than the rate card value as monitored by Gallup AdFact. At the beginning of 2000, the TV advertising market showed signs of recovery: in the fourth quarter of 1999, rate card revenues showed a very significant increase over quarter one, but growth in 2000 is expected to be slow.

In audience research, the joint service of Russian Research and Gallup TV continued to provide throughout 1999 the national currency ratings, reported from a national panel of 1,200 peoplemeter households, supplemented by measurement of 20 individual local markets using meters and diaries. A competitive national diary service was launched by GfK VCIOM with disastrous results, finding no widespread client support and closing within the year.

At the end of 1999, Russian Research sold its part of the audience research business to Gallup, in order to focus on its specialised broadcast and advertising research services, thereby consolidating Gallup's position as the commercial monopoly supplier of TV ratings. With industry support, at the beginning of 2000, Gallup launched its development plan to expand the size and geographical scope of the national panel.

Russia

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General Data

COUNTRY	
Land area (km ²)	17 075 400
Total population ¹	146 693 300
Number of households	51 652 600
Average household size	2.5
In % of households equipped	
Phone	55.6
Mobile telephone subscribers	1.1
PC/laptop at home	5.8
Internet	1.0
Internet user*	3.2

* in % of population

TV OVERVIEW	
Total number of TV households (TVHH)	50 774 500
In % of all households	98.3
Numbers of channels received by 70% of the population	7
TV License-Fee cost per year	none

TV EQUIPMENT	
	in % of TVHH
Colour TV	90.4
Multiset (homes with more than 1 TV set)	40.2
VCR	41.8
Teletext	11.9
Remote control	64.5

Source: Gallup TV

Note: Data is for urban Russia only

ECONOMICS	
GDP in million RUR (at current prices)	4 476 100
GDP per capita in RUR (at current prices)	30 513
Inflation rate in 1999 (in %)	36.0
Value of RUR in Euro (EUR)	1 EUR = 24.82 RUR
Value of RUR in US-Dollar (USD)	1 USD = 24.53 RUR

Sources: State Agency for Statistics (GosKomStst); Gallup Media; Gallup AdFact

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	14.5
	connected	n.a.
Satellite	private dish/DTH	1.5
	collective dish/SMATV	n.a.
Terrestrial	analog	99.8
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	0.1%	Digital TV subscribers	0.2%

Source: Gallup TV; NTV+, Kosmos TV

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.*	Language	h/week	Programming	Revenue	Sales House
ORT	1994	T	99.6%	Russian	145	Generalist	Adv., Gvt.	Video Intl.
RTR	1991	T	98.6%	Russian	138	Generalist	Adv., Gvt.	Video Intl.
TV CENTRE	1997	T	43.3%	Russian	133	Generalist	Adv., Moscow Gvt.	Maxima
KULTURA	1998	T	45.0%	Russian	89	Generalist	Gvt.	none

Source: Russian Research; Gallup TV

*in % of population

Note: There are 92 local and regional GTRK channles in big Russian cities, all of them are part of the EPTK state broadcast organisation, which also includes RTR and Kultura national.

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.*	Language	h/week	Programming	Revenue	Sales House
NTV	1994	T	77.5%	Russian	135	Generalist	Adv.	Smart Media
TV6	1993	T	56.3%	Russian	135	Generalist	Adv.	Video Intl.
CTC	1996	T	49.3%	Russian	135	Generalist	Adv.	Video Intl.
REN TV	1997	T	54.3%	Russian	131	Generalist	Adv.	In-house
THT	1998	T	31.1%	Russian	123	Generalist	Adv.	Smart Media
TV 3 RUSSIA	1998	T	**	Russian	100	Generalist	Adv.	In-house
AST	1996	T	n.a.	Russian	n.a.	Generalist	Adv.	n.a.
MTV	1999	T	n.a.	Russian	135	Music	Adv.	n.a.
MUZTV	1999	T	n.a.	Russian	143	Music	Adv.	n.a.

Source: Russian Research; Gallup TV

*in % of population, **Moscow, St Petersburg, Chelyabinsk

Note: There are more than 800 local and regional commercial TV channels in Russia.

PAY TV BASIC CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
MIR KINO (CINEMA WORLD)	Private	S	0.2%	Russian	Movie	Adv., Sub.
DETSKI MIR (KIDS' WORLD)	Private	S	0.2%	Russian	Kids	Adv., Sub.
NASHE KINO (OUR CINEMA)	Private	S	0.2%	Russian	Russian Movie	Adv., Sub.
NTV	Private	S	0.2%	Russian	Generalist	Adv., Sub.
THT	Private	S	0.2%	Russian	Generalist	Adv., Sub.
MTV-RUSSIA	Private	S	0.2%	Russian	Music	Adv., Sub.
RTR	Public	S	0.2%	Russian	Generalist	Adv., Sub.
KULTURA (CULTURE)	Public	S	0.2%	Russian	Generalist	Adv., Sub.
HK	Private	MMDS	0.1%	Russian	Russian Movie	Adv., Sub.

Source: Russian Research

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
EUROSPORT	Private	S, MMDS	0.3%	Russian	Sport	Adv., Sub.
ROMANTICA	Private	S	0.2%	Russian	Soap	Adv., Sub.
NICKELODEON	Private	S, MMDS	0.3%	Russian	Kids	Adv., Sub.
ANIMAL PLANET	Private	S, MMDS	0.3%	Russian/English	Documentary	Adv., Sub.
DISCOVERY	Private	S, MMDS	0.3%	Russian/English	Documentary	Adv., Sub.
FASHION TV	Private	S	0.2%	Russian	Fashion	Adv., Sub.
E!	Private	S	0.2%	Russian	Entertainment	Adv., Sub.
HALLMARK	Private	S, MMDS	0.3%	Russian	Movie	Adv., Sub.
FOX KIDS	Private	S, MMDS	0.3%	Russian/English	Kids	Adv., Sub.
BBC WORLD	Private	S, MMDS	0.3%	Russian/English	News	Adv., Sub.
DISCOVERY TRAVEL & ADVENTURE	Private	S	0.2%	Russian/English	Documentary	Adv., Sub.
MUZZIK	Private	S	0.2%	Russian	Music	Adv., Sub.
EURONEWS	Private	S, MMDS	0.3%	Rus./Engl./Fr./Germ.	News	Adv., Sub.
VH-1	Private	S, MMDS	0.3%	Russian	Music	Adv., Sub.
CNN INTERNATIONAL	Private	S, MMDS	0.3%	Russian/English	News	Adv., Sub.
CARTOON NETWORK	Private	S, MMDS	0.3%	Russian/English	Cartoons	Adv., Sub.
DISCOVERY CIVILISATION	Private	S	0.2%	Russian/English	Documentary	Adv., Sub.
DISCOVERY SCI-TREK	Private	S	0.2%	Russian/English	Documentary	Adv., Sub.
TCM	Private	S	0.2%	Russian/English	Classic Movie	Adv., Sub.
MTV	Private	MMDS	0.1%	Russian/English	Music	Adv., Sub.
TRAVEL	Private	MMDS	0.1%	Russian/English	Documentary	Adv., Sub.
TNT	Private	MMDS	0.1%	Russian/English	Classic Movie	Adv., Sub.
BBC PRIME	Public	MMDS	0.1%	English	Entertainment	Adv., Sub.
NATIONAL GEOGRAPHIC	Private	MMDS	0.1%	English	Documentary	Adv., Sub.
BLOOMBERG INTERNATIONAL	Private	MMDS	0.1%	English	News	Adv., Sub.
CNBC	Private	MMDS	0.1%	English	News	Adv., Sub.

Source: NTV+; Kosmos TV

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
TV 5	Public	S	0.2%	Russian/French	Generalist	Adv., Sub.
M 6	Private	MMDS	0.1%	French	Entertainment	Adv., Sub.
NHK	Public	MMDS	0.1%	Japanese	News	Sub.
TVE	Public	MMDS	0.1%	Spanish	Generalist	Sub.
PRO 7	Private	MMDS	0.1%	German	Entertainment	Adv., Sub.
VIVA	Private	MMDS	0.1%	German	Music	Adv., Sub.
VIVA 2	Private	MMDS	0.1%	German	Music	Adv., Sub.

Source: NTV+; KOSMOS TV

PAY TV PREMIUM CHANNELS							
Domestic Channels (NTV+)		Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
NTV+ Sport		Private	S	0.2%	Russian	Sport	Sub., Adv.
NTV+ Football		Private	S	0.2%	Russian	Sport	Sub., Adv.
NTV+ BOYEVIK (NTV+ BLOCKBUSTER)		Private	S	0.2%	Russian	Blockb. movies	Sub., Adv.
NOCHNOI KANAL (LATE NIGHT CH.)		Private	S	0.2%	Russian	Erotic	Sub., Adv.
Foreign/pan european channels (Kosmos TV)							
THE ADULT CHANNEL		Private	MMDS	0.1%	Russian	Erotic	Adv., Sub.
SEZAM		Private	MMDS	0.1%	Russian	Movie	Adv., Sub.

Sources: NTV+; KOSMOS TV

MMDS PAY TV PACKAGES								
Channels	Launch	Diff.	Decoder	Subscr.	Language	No. of Ch.	Revenue	Sales H.
KOSMOS TV	1996	MMDS	n.a.	25 000*	Russian**	27	Sub., Adv.	In-house
Packages are:				Basic 1		15	USD 17.-/month	
				Basic 2		25	USD 38.-/month	
				Premium		1	USD 8.-/month	

Source: KOSMOS TV

*Estimated for January 2000, **English/German/French/Spanish/Japanese

DIGITAL PAY TV PACKAGES								
Channels	Launch	Diff.	Decoder	Subscr.	Language	No. of Ch.	Revenue	Sales H.
NTV+	1999	S	XSATCD.TV 300*	109 000**	Russian***	32	Sub., Adv.	Smart M.
Packages are:				Basic		13	USD 8.95/month	
				Basic + 1 premium ch.		14	USD 16.90/month	
				Basic + 2 premium ch.		15	USD 24.85/month	
				Standard		27	USD 18.95/month	
				Standard + 1 premium ch.		28	USD 24.90/month	
				Standard + 2 premium ch.		29	USD 29.85/month	
				Standard + 3 premium ch.		30	USD 32.80/month	

Source: NTV+

*SAMSUNG VDS3300, **Estimated for January 2000, ***English/German/French

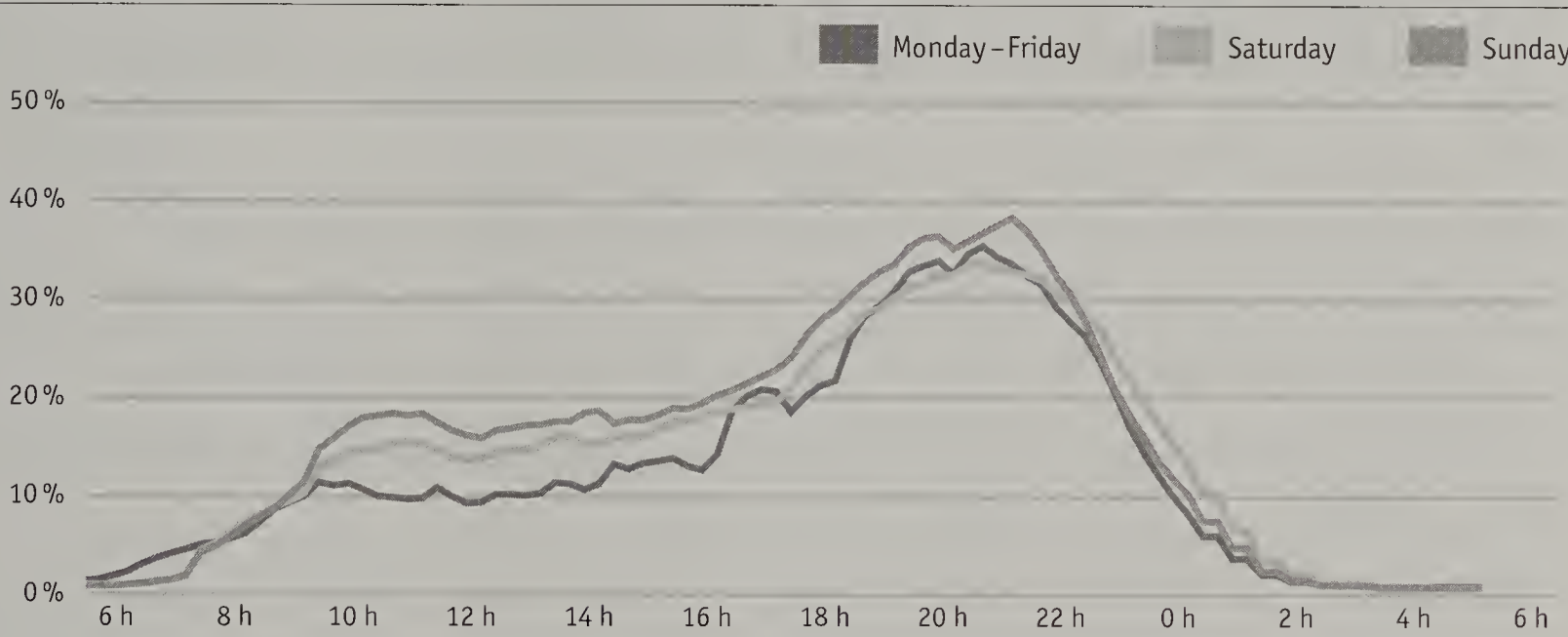
Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	TV Indes '99: a joint Gallup TV/Russian Research service
Panel/Sampling Size	Nat. panel: 1 200 households; 20 local city samples of minimum 100 households
Instrument used	Nat. panel: Nielsen Eurometer; local samples: combin. of meters/diaries
Sampling Universe: Cities 400 000+ in 000	
Individuals 6+	41 983
Adults 16+	35 710
Main Purchase Responsibles	15 600
Young Adults 16–39	16 275
Children 6–15	6 273

Source: State Agency for Statistics (GoskomStat); TV Index '99

Note: National peplemeter panel system was launched in 1999. Diary panel was first launched in 1992.

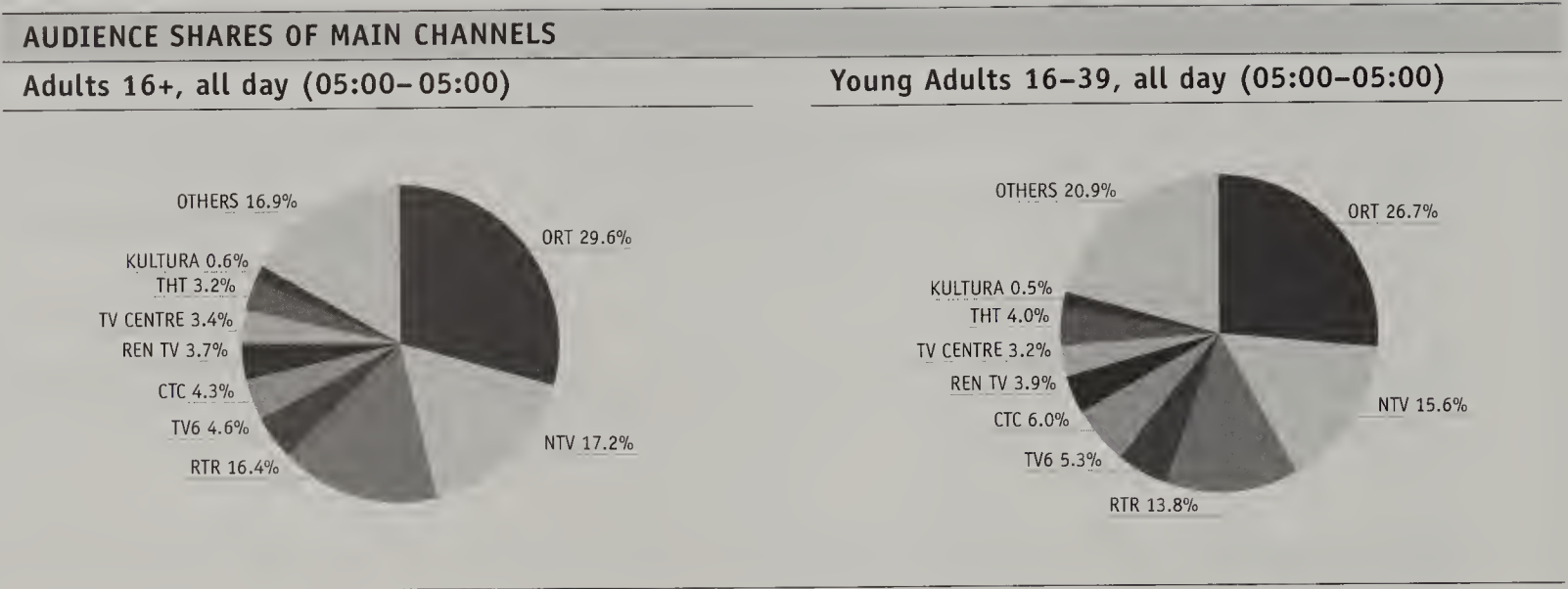
TOTAL TV RATING 1999
Adults Age: 16+



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)				
	Adults 16+	Children 6–15	Young Adults 16–39	Main Purchase Responsibles
	1999	1999	1999	1999
Daily reach in %	69.0	70.0	65.0	76.0
Viewing time per Viewer	265	218	244	302
Viewing time per Individual	182	152	159	230

Source: TV Index '99

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 05:00 – 05:00								
	Adults 16+		Young Adults 16–39		Children 6–15		Main Purchase Responsibles	
	1998	1999	1998	1999	1998	1999	1998	1999
ORT	n.a.	29.6%	n.a.	26.7%	n.a.	25.0%	n.a.	28.3%
NTV	n.a.	17.2%	n.a.	15.6%	n.a.	10.8%	n.a.	19.5%
RTR	n.a.	16.4%	n.a.	13.8%	n.a.	12.7%	n.a.	18.5%
TV6	n.a.	4.6%	n.a.	5.3%	n.a.	4.8%	n.a.	4.9%
CTC	n.a.	4.3%	n.a.	6.0%	n.a.	13.0%	n.a.	3.2%
REN TV	n.a.	3.7%	n.a.	3.9%	n.a.	3.9%	n.a.	4.3%
TV CENTRE	n.a.	3.4%	n.a.	3.2%	n.a.	2.1%	n.a.	4.3%
THT	n.a.	3.2%	n.a.	4.0%	n.a.	3.9%	n.a.	2.4%
KULTURA	n.a.	0.6%	n.a.	0.5%	n.a.	0.4%	n.a.	1.4%
OTHERS	n.a.	16.9%	n.a.	20.9%	n.a.	23.3%	n.a.	13.1%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 16+		Young Adults 16–39		Children 6–15		Main Purchase Responsibles	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	9–19 h	19–23 h	9–19 h	19–23 h	9–19 h	19–23 h	9–19 h	19–23 h
ORT	29.2%	30.6%	25.5%	27.9%	23.9%	27.1%	28.4%	28.8%
NTV	15.7%	18.6%	13.9%	17.2%	8.9%	13.1%	18.0%	20.3%
RTR	18.4%	14.6%	15.1%	12.4%	14.1%	10.6%	20.0%	17.3%
TV6	4.8%	4.4%	5.5%	5.3%	4.7%	4.6%	4.9%	4.9%
CTC	5.1%	3.8%	7.3%	5.5%	14.2%	12.1%	3.8%	2.9%
REN TV	3.6%	4.1%	3.9%	3.9%	3.8%	4.2%	3.9%	5.1%
TV CENTRE	3.4%	3.1%	3.6%	3.0%	2.2%	1.9%	4.1%	4.0%
THT	3.3%	2.9%	3.9%	3.7%	4.7%	3.1%	2.6%	2.1%
KULTURA	0.7%	0.6%	0.6%	0.4%	0.5%	0.3%	1.4%	1.3%
OTHERS	15.7%	17.3%	20.6%	20.7%	22.9%	22.9%	12.8%	13.3%

Source: TV Index '99

Note: Measured within national panel.

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
STREETS OF BROKEN LAMPS	Russia	ORT	Series-Crime	19:47	22/03	22.4%	53.9%
FIELD OF WONDERS	Russia	ORT	Game Show	19:48	04/04	21.9%	49.1%
IN THE NAME OF LOVE	Brazil	ORT	Series-Daily Soap	19:43	19/10	20.2%	51.8%
IVAN VASILIEVICH CHANGES PROF.	Russia	ORT	Movie	19:12	08/11	19.7%	46.2%
HARD TARGET	USA	ORT	Movie	21:46	08/11	19.4%	54.8%
DORENKO'S PROGRAMME	Russia	ORT	News	21:00	24/10	19.0%	44.1%
THE DEAD ZONE	USA	ORT	Movie	21:38	31/01	19.0%	44.8%
WHEN FINANCES ARE SING. ROMANCES	Russia	ORT	Comedy Show	18:15	12/12	18.9%	46.5%
AT THE CORNER NEXT TO PATR. PONDS	Russia	ORT	Series-General	19:42	03/11	18.6%	48.2%
WOMEN'S DAY CONCERT	Russia	ORT	Variety Show	21:38	07/03	18.3%	46.4%
THE LAW OF COLUMBO	USA	ORT	Movie	21:37	07/02	18.0%	44.5%
ETERNAL CALL	Russia	ORT	Series-General	19:48	18/03	18.0%	43.9%
PRESIDENTIAL ADDRESS	Russia	ORT	Special Event	23:45	31/12	17.9%	41.8%
ALLA PUGACHYOVA. RECENT HISTORY	Russia	ORT	Documentary	19:48	15/04	17.8%	48.5%
GOLDEN GRAMOPHONE	Russia	ORT	Music	21:48	24/12	17.8%	54.8%
CROSSROAD	Russia	ORT	Movie	19:03	08/03	17.5%	42.8%
THE MOST CHARMING AND BEAUTIFUL	Russia	ORT	Movie	19:21	07/02	17.2%	40.2%
METRO	USA	ORT	Movie	18:53	31/10	16.8%	42.9%
THE CRUEL ANGEL	Brazil	ORT	Series-Daily Soap	17:00	31/03	16.7%	62.5%
WAIT AND REMEMBER ME	Russia	ORT	Documentary	19:46	12/04	16.7%	46.3%

Source: TV Index '99 (channels measured within national panel)

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
IVAN VASILIEVICH CHANGES PROF.	Russia	ORT	19:12	08/11	19.7%	46.2%
HARD TARGET	USA	ORT	21:46	08/11	19.4%	54.8%
THE DEAD ZONE	USA	ORT	21:38	31/01	19.0%	44.8%
THE LAW OF COLUMBO	USA	ORT	21:37	07/02	18.0%	44.5%
CROSSROAD	Russia	ORT	19:03	08/03	17.5%	42.8%
THE MOST CHARMING AND BEAUTIFUL	Russia	ORT	19:21	07/02	17.2%	40.2%
METRO	USA	ORT	18:53	31/10	16.8%	42.9%
THE FUGITIVE	USA	ORT	21:38	25/04	16.6%	50.3%
OFFICE ROMANCE	Russia	ORT	16:17	13/12	16.5%	46.7%
ACTION Y AND OTHER ADV. OF SHURIK	Russia	ORT	19:15	26/12	16.3%	37.8%

Source: TV Index '99 (channels measured within national panel)

TOP 10 SPORT EVENTS						
Title		Channel	Start. Time	Date	Audience	Share
FBAL RUSSIA-UKRAINE		ORT	19:53	09/10	15.6%	40.8%
FBAL UEFA CUP RUSSIA-ICELAND		ORT	18:45	09/06	9.1%	37.1%
FIGURE SKATING EU.CHMP		RTR	18:00	31/01	7.3%	21.9%
FBAL CL SPARTAK-BORDEAUX		NTV	19:51	20/10	7.1%	19.6%
FBAL CL SPARTAK-WILLEM II		NTV	19:51	26/10	6.9%	19.6%
FBAL CHAMPIONS CUP		ORT	14:55	31/01	6.9%	28.3%
ICE HOCKEY W. CHMP		ORT	18:53	10/05	6.4%	21.9%
FBAL RUSSIA-ARMENIA		ORT	18:50	27/03	6.0%	18.8%
FIGURE SKATING W. CHMP		ORT	16:59	20/03	5.9%	26.3%
FBAL SUPER CUP		ORT	21:53	08/04	5.9%	21.9%

Source: TV Index '99 (channels measured within national panel)

Top Programmes Channel by Channel

ORT							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
STREETS OF BROKEN LAMPS	Russia	Series–Crime	11	19:45	60	19.6%	51.8%
AT THE CORNER NEXT TO P. PONDS	Russia	Series–General	4	19:45	60	17.8%	49.8%
DORENKO’S PROGRAMME	Russia	News	14	21:00	55	16.0%	41.0%
FIELD OF WONDERS	Russia	Game Show	52	19:45	55	15.5%	46.5%
KVN-99	Russia	Game Show	4	18:55	120	15.5%	39.1%
IN THE NAME OF LOVE	Brazil	Series–Daily Soap	29	19:45	55	15.3%	44.6%
THE CRUEL ANGEL	Brazil	Series–Daily Soap	45	17:05	50	15.0%	58.9%
ETERNAL CALL	Russia	Series–General	27	19:50	55	15.0%	39.6%
BUDULAI RETURNS	Russia	Series–General	4	19:40	60	13.5%	38.9%
KVN-99	Russia	Game Show	8	21:38	120	12.5%	43.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
IVAN VASILIEVICH CHANGES PROF.	Russia	Movie	08/11	19:12	101	19.7%	46.2%
HARD TARGET	USA	Movie	08/11	21:46	101	19.4%	54.8%
THE DEAD ZONE	USA	Movie	31/01	21:38	103	19.0%	44.8%
WHEN FINANCES ARE SING. ROM.	Russia	Comedy Show	12/12	18:15	158	18.9%	46.5%
WOMEN’S DAY CONCERT	Russia	Variety Show	07/03	21:38	149	18.3%	46.4%
THE LAW OF COLUMBO	USA	Movie	07/02	21:37	94	18.0%	44.5%
PRESIDENTIAL ADDRESS	Russia	Special Event	31/12	23:45	10	17.9%	41.8%
ALLA PUGACHYOVA. RECENT HIST.	Russia	Documentary	15/04	19:48	55	17.8%	48.5%
GOLDEN GRAMOPHONE	Russia	Music	24/12	21:48	172	17.8%	54.8%
CROSSROAD	Russia	Movie	08/03	19:03	110	17.5%	42.8%

Source: TV Index '99

RTR							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ANSHLAG PRESENTS	Russia	Comedy Show	30	20:55	30	8.4%	19.0%
ANSHLAG & CO	Russia	Comedy Show	14	19:55	60	8.3%	23.3%
GORODOK	Russia	Comedy Show	8	11:30	30	8.1%	38.5%
MANY HAPPY RETURNS OF THE DAY	Russia	Series–General	7	19:30	50	8.0%	21.8%
ANSHLAG & CO	Russia	Comedy Show	12	21:00	60	7.5%	22.0%
EACH FOR EACH OTHER	Russia	Magazine	5	21:45	15	7.0%	23.0%
GORODOK	Russia	Comedy Show	21	21:00	30	6.7%	17.5%
MYSELF A DIRECTOR	Russia	Comedy Show	38	20:50	30	6.5%	16.3%
MYSELF A DIRECTOR	Russia	Comedy Show	17	10:30	30	6.2%	29.5%
ANSHLAG & CO	Russia	Comedy Show	18	11:05	60	6.1%	31.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GOLUBOI OGONYOK	Russia	Variety Show	31/12	23:28	216	15.2%	35.5%
PM PUTIN NEW YEAR ADDRESS	Russia	Special Event	31/12	23:56	6	15.1%	31.0%
ZADORNOV’S NON-ANNIVERSARY	Russia	Variety Show	08/03	10:36	194	14.7%	50.5%
30 YEARS LATER	Russia	Variety Show	13/12	19:47	190	14.7%	43.9%
PRESIDENTIAL ADDRESS	Russia	Special Event	31/12	23:45	10	12.5%	29.0%
COBRA	USA	Movie	20/11	21:46	99	11.4%	28.7%
STAMP	USA	Movie	28/02	21:14	99	10.8%	30.3%
THE UNCATCHABLE	Russia	Movie	07/11	16:53	77	10.2%	36.4%
TO THE LADIES!	Russia	Movie	18/04	21:28	78	10.1%	32.8%
NATASHA KOROLYOVA. CONCERT	Russia	Music	03/04	20:38	133	10.0%	23.1%

Source: TV Index '99

NTV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
STREETS OF BROKEN LAMPS	Russia	Series–Crime	32	20:45	60	12.8%	29.9%
DDD. DETECTIVE DUBR. DOSSIER	Russia	Series–Crime	18	20:50	60	9.8%	28.7%
CRIMINAL RUSSIA	Russia	Magazine	2	21:30	30	8.8%	21.8%
TOP SECRET	Russia	Magazine	5	20:55	55	8.4%	23.7%
TODAY. SPECIAL EDITION	Russia	News	2	21:15	10	7.8%	18.0%
THE MEETING PLACE CAN'T BE...	Russia	Series–Crime	5	20:05	80	7.4%	19.6%
IF TOMORROW COMES	USA	Series–General	7	20:00	60	7.3%	25.9%
LUCKY YOU!	Russia	Game Show	5	20:00	45	7.2%	20.7%
NAMEDNI. PROJECT 92-9	Russia	Magazine	8	20:55	50	6.7%	15.5%
CRIMINAL RUSSIA	Russia	Magazine	2	16:55	55	6.7%	29.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
VOROSHILOV SNIPER	Russia	Movie	12/12	19:00	111	14.4%	32.0%
NIKO. IN THE NAME OF JUSTICE	USA	Movie	14/03	19:00	99	12.8%	33.7%
FIRST BLOOD	USA	Movie	21/02	19:00	100	12.2%	31.2%
FBI AGENTS	USA	Movie	18/02	20:05	92	11.5%	27.9%
DELTA MISSION	USA	Movie	07/02	19:04	99	11.4%	26.3%
CROCODILE-KILLER:2	USA	Movie	08/02	20:02	94	11.1%	26.7%
ANGELICA AND THE SULTAN	France	Movie	18/12	20:00	110	11.0%	23.4%
CROCODILE-KILLER	USA	Movie	01/02	20:01	94	10.4%	27.3%
BIHIND THE ENEMY LINES	USA	Movie	11/02	19:53	94	10.3%	26.0%
ONE CHANCE FOR THE TWO	Russia	Movie	28/11	18:49	122	10.2%	24.4%

Source: TV Index '99

TV 6							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
33 SQUARE METERS	Russia	Series–Daily Soap	8	22:00	30	3.0%	9.8%
AND 33 SQUARE METERS AGAIN	Russia	Series–Daily Soap	3	19:40	30	2.4%	6.0%
TAVERN OSP-STUDIO	Russia	Comedy Show	6	20:30	60	2.3%	6.5%
33 SQUARE METERS	Russia	Series–Daily Soap	9	19:45	30	2.3%	6.0%
YOU ARE A WITNESS	Russia	Magazine	6	20:45	45	2.2%	5.7%
TALK SHOW I MYSELF	Russia	Talk Show	53	20:30	45	2.2%	4.0%
DISASTER OF THE WEEK	Russia	Magazine	41	17:30	45	2.0%	8.7%
FAMILY 2000	Russia	Comedy Show	5	22:20	20	2.0%	2.0%
SV-SHOW	Russia	Comedy Show	18	21:25	25	1.9%	3.7%
YOU ARE A WITNESS	Russia	Magazine	43	18:30	30	1.9%	6.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GENIUS	Russia	Movie	11/04	20:59	162	5.9%	19.2%
OSP SONG-99	Russia	Variety Show	01/04	20:33	120	4.7%	11.5%
THE IRONY OF FATE	Russia	Movie	31/12	16:41	194	4.1%	12.9%
OSP SONG-99	Russia	Variety Show	03/05	17:50	118	4.1%	14.1%
TAKE CARE OF WOMEN	Russia	Movie	08/03	10:27	120	3.8%	14.5%
WITHIN FRACTION OF SECOND	Russia	Movie	08/02	20:32	89	3.8%	9.3%
SINGLE FATHER	Russia	Movie	16/10	20:56	100	3.7%	10.7%
INTERGIRL	Russia	Movie	05/06	20:06	149	3.6%	13.0%
SPECIAL ALERT ZONE	Russia	Movie	21/02	20:07	97	3.6%	8.7%
PROPHET	Russia	Movie	03/12	20:47	104	3.4%	9.8%

Source: TV Index '99

TV CENTRE							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
INFATUATION	n.a.	Series-General	11	15:00	45	2.0%	12.7%
NAVARRO	n.a.	Series-General	17	20:30	90	1.8%	6.0%
TV CENTRE RETURNS	Russia	Magazine	5	14:20	60	1.6%	8.8%
MOTORACING CHMP		Sport	4	20:30	75	1.5%	4.5%
DALZIEL AND PASCOE	UK	Series-Crime	4	19:55	90	1.4%	3.2%
NEDELYA	Russia	News	16	20:00	45	1.3%	3.7%
RUSSIAN MYSTERIES	Russia	Magazine	2	20:55	30	1.3%	4.7%
JUST YOU WAIT!	Russia	Cartoons	6	11:40	25	1.3%	3.0%
SPECIAL FOLDER	Russia	News	10	21:05	40	1.2%	3.0%
GOLDEN CAGE	n.a.	Series-General	31	16:30	45	1.2%	8.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
COMING TO AMERICA	USA	Movie	11/12	20:59	122	4.4%	11.4%
BARKHANOV AND HIS BODYGUARDS	Russia	Movie	23/05	20:53	116	4.2%	11.9%
A BEAUTY AND DENIS	USA	Movie	19/02	20:30	97	3.7%	9.8%
BROTHER	Russia	Movie	28/05	20:15	99	3.5%	7.7%
SAVOY	USA	Movie	31/01	17:00	79	3.2%	11.2%
SAME AGE	Russia	Movie	05/05	20:32	78	3.1%	9.0%
SUNDAY DADDY	USA	Movie	07/02	12:03	81	3.0%	12.5%
TO LOVE RUSSIAN WAY:2	Russia	Movie	18/12	20:51	101	2.9%	7.8%
GOLDEN CHILD	USA	Movie	04/12	20:59	99	2.9%	7.2%
MARRIED BACHELOR	Russia	Movie	31/01	12:16	86	2.9%	13.1%

Source: TV Index '99

CTC							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
AMAZING WANDERINGS	USA	Series-General	36	21:00	55	2.1%	6.0%
TIME LINES	USA	Series-General	24	13:00	50	1.9%	9.7%
AMAZING WANDERINGS	USA	Series-General	4	21:00	55	1.9%	5.2%
KNIGHTRIDER	USA	Series-Action	63	14:00	55	1.6%	10.5%
QUANTUM LEAP	USA	Series-Action	229	18:00	50	1.4%	7.0%
THE A TEAM	USA	Series-Action	151	17:00	50	1.4%	7.0%
BEVERLY HILLS	USA	Ser.-Daily Soap	190	20:00	50	1.4%	4.9%
THE A TEAM	USA	Series-Action	45	13:00	50	1.3%	11.3%
NUTS	USA	Cartoon	60	16:30	20	1.3%	8.5%
UP-UP ABOVE THE EARTH	USA	Documentary	6	18:00	50	1.3%	5.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
BURIED ALIVE	USA	Movie	15/08	21:00	114	4.4%	15.1%
BREWSTER'S MILLIONS	USA	Movie	09/04	20:59	119	4.1%	11.4%
TRUE LIES	USA	Movie	03/09	21:01	168	3.8%	14.5%
STOP! OR MY MOM WILL SHOOT	USA	Movie	07/05	21:00	108	3.8%	10.4%
STOP! OR MY MOM WILL SHOOT	USA	Movie	26/12	21:02	108	3.6%	8.0%
TREMORS	USA	Movie	15/05	21:01	116	3.3%	11.0%
BATTERIES NOT INCLUDED	USA	Movie	30/04	21:01	128	3.2%	11.0%
THE CONCIERGE	USA	Movie	02/04	21:00	112	3.0%	8.3%
BURIED ALIVE: 2	USA	Movie	22/08	21:01	114	2.8%	8.9%
POLICEMAN AND A BOY	USA	Movie	12/02	21:00	113	2.8%	6.8%

Source: TV Index '99

REN TV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
CELESTA AND CELESTA ONLY	Argentina	Ser.–Daily Soap	57	19:00	55	3.4%	9.8%
CELESTA	Argentina	Ser.–Daily Soap	173	18:55	55	3.3%	10.5%
BLACK PEARL	Argentina	Ser.–Daily Soap	40	18:55	55	3.2%	7.5%
X-FILES	USA	Ser.–Mysterious	26	21:35	55	2.4%	4.8%
SAHARA'S MYSTERY	USA	Ser.–Mysterious	4	21:30	50	1.8%	5.6%
WITNESS BY CHANCE	Russia	News	45	19:55	30	1.7%	6.5%
RACKET	Russia	Series–Crime	5	14:45	65	1.6%	14.9%
WHITE PARROT CLUB	Russia	Comedy Show	20	19:55	30	1.6%	4.5%
X-FILES	USA	Ser.–Mysterious	19	19:35	55	1.6%	5.8%
WITNESS BY CHANCE	Russia	News	25	22:30	30	1.5%	4.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
DEATH PLATOON	USA	Movie	28/04	21:33	98	3.5%	12.7%
DOUBLE WAMMY	USA	Movie	22/02	21:33	95	3.4%	5.3%
KARAN AND ARJUN	n.a.	Movie	13/03	15:04	157	3.3%	15.5%
BEAUTY KILLS	USA	Movie	04/03	21:34	102	2.9%	9.3%
THE BEST SQUAD	n.a.	Movie	29/12	21:35	104	2.9%	8.9%
LOVE IN EARNEST	Russia	Movie	06/02	15:03	139	2.8%	14.1%
EVIL FOR THE SAKE OF GOOD	n.a.	Movie	20/12	21:33	104	2.7%	7.7%
PLATO'S RUN	USA	Movie	08/04	21:33	105	2.7%	9.3%
SILENT FLUTE	n.a.	Movie	12/05	21:33	103	2.6%	10.1%
JUDGE AND JURY	USA	Movie	29/06	21:33	102	2.6%	10.1%

Source: TV Index '99

THT							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
NEW ADVENTURES OF COPS	Russia	Series–Crime	2	21:30	60	5.8%	13.3%
NEW ADVENTURES OF COPS: 1	Russia	Series–Crime	5	21:30	60	5.8%	13.3%
STREETS OF BROKEN LAMPS	Russia	Series–Crime	31	19:15	70	3.1%	11.5%
KVN-99	Russia	Game Show	2	22:35	120	2.0%	7.4%
KVN-99	Russia	Game Show	7	21:30	90	1.9%	6.5%
NATIONAL SECURITY AGENT	USA	Series–Action	13	21:30	60	1.9%	5.3%
MURDER SHE WROTE	USA	Series–Crime	82	19:30	55	1.6%	4.3%
EDGE OF UNIVERSE	USA	Series–General	17	17:30	60	1.6%	5.8%
DIAGNOSIS: MURDER	USA	Series–Crime	58	19:30	55	1.4%	3.5%
VERY ENGLISH MURDER	UK	Series–Crime	10	19:30	60	1.3%	5.5%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
DEATH SHOW	Russia	Movie	15/03	21:31	115	4.9%	16.9%
JAGUAR	USA	Movie	07/04	21:31	113	4.1%	13.9%
A MAD BUS	USA	Movie	26/07	21:31	120	3.8%	15.1%
A STUNTMAN	USA	Movie	01/07	21:31	134	3.6%	15.4%
EVERYTH. WE WERE DREAMING OF	Russia	Movie	13/06	22:01	109	3.6%	16.7%
CRIMINAL INVESTIGATION DEPARTM.	USA	Movie	01/11	21:30	88	3.3%	10.3%
CITY TORPEDOES	HONG KONG	Movie	13/05	21:31	91	3.3%	11.3%
THE CROW	USA	Movie	27/04	21:32	110	3.2%	11.7%
A PRINCESS AND A BEAN	Russia	Movie	04/10	21:31	128	3.2%	10.8%
SHIRLI-MYRLI	Russia	Movie	10/04	23:05	149	3.1%	17.0%

Source: TV Index '99

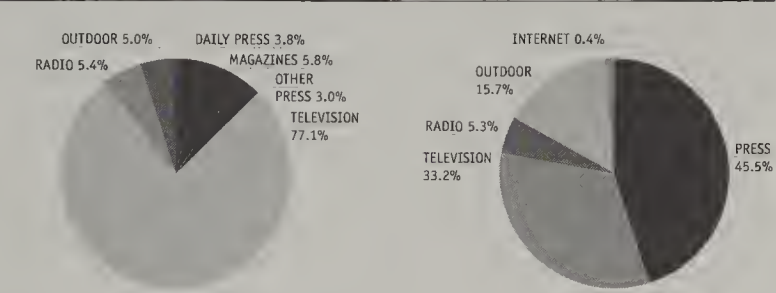
KULTURA							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MEMOIRS WITH FITIL	Russia	Magazine	4	19:20	25	0.3%	0.7%
GREAT PALACES OF THE WORLD	Russia	Magazine	11	13:00	25	0.3%	1.5%
WORLD OF AVIATION	Russia	Magazine	22	18:05	25	0.3%	1.0%
ACTORS' HOUSE	Russia	Magazine	11	20:00	50	0.3%	1.3%
THE IDOLS	Russia	Magazine	3	19:35	25	0.3%	0.8%
CHILDREN'S WORLD	Russia	Magazine	2	17:20	25	0.3%	2.0%
GREAT PALACES OF THE WORLD	Russia	Magazine	10	16:40	25	0.3%	2.5%
MY DESTINY	Russia	Magazine	11	22:15	25	0.3%	0.9%
FAMOUS EUROPEAN CASTLES	Russia	Magazine	26	15:55	25	0.3%	1.2%
CHILDREN'S WORLD	Russia	Magazine	1	12:27	25	0.3%	2.0%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
HE WAS ADMIRER BY EVERYONE	Russia	Magazine	01/03	19:11	56	0.8%	2.7%
VASILIEVA'S ANNIVERSARY	Russia	Variety Show	06/02	19:45	92	0.5%	1.4%
OH, AROSEVA!	Russia	Variety Show	08/03	20:56	62	0.5%	1.1%
FAMILY, LIFE, DESTINY	Russia	Magazine	28/12	22:12	25	0.5%	1.1%
PRINCESS, HUSSARS, ETC.	Russia	Magazine	16/04	19:36	38	0.4%	1.3%
TEACHERS AND DISCIPLES	Russia	Magazine	26/12	16:27	65	0.4%	1.8%
GLUZSKI'S BENEFICE	Russia	Variety Show	07/03	22:20	49	0.4%	0.8%
NO OVATION PLEASE	Russia	Variety Show	20/03	11:00	51	0.4%	2.3%
VLADIMIR VYSOTSKI	Russia	Magazine	26/07	16:29	59	0.3%	2.8%
THEATRE LEGENDS	Russia	Magazine	08/05	14:47	11	0.3%	2.1%

Source: TV Index '99

Advertising Expenditure

ADVERTISING FIGURES		GROSS*	NET**
Total adspend	(in million RUR***)	63 077	14 032
Total adspend	(in million USD)	2 571	572
Total adspend	(in million EUR)	2 542	565
TV adspend	(in million RUR)	48 624	4 661
TV adspend	(in million USD)	1 982	190
TV adspend	(in million EUR)	1 959	188
TV adspend	in % of GDP	1.09	0.10
TV adspend	per capita (USD)	13.5	1.35

SHARE OF MEDIA EXPENDITURE	GROSS/NET
Category: Market Share in %	

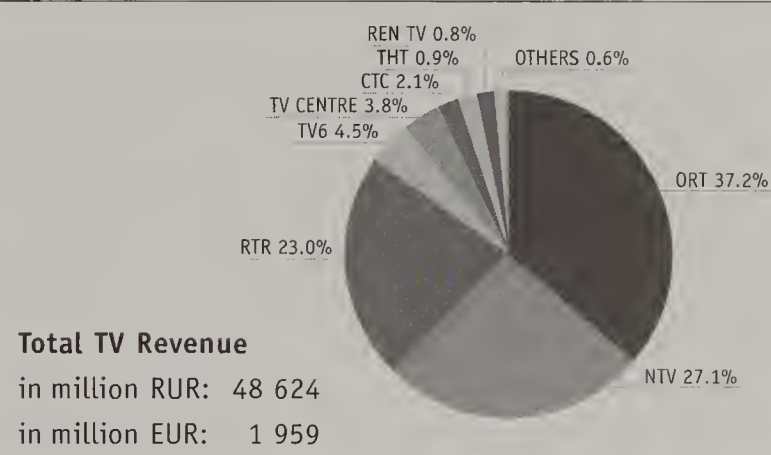


Total Revenue (Gross)	Total Revenue (Net)
in million RUR: 63 077	in million RUR: 14 032
in million EUR: 2 542	in million EUR: 565

TV ADVERTISING STATISTICS	
Total number of spots broadcast	833 656
Average spot length (in sec.)	27.0
Total number of advertisers	16 614
Number of TV advertisers	4 923
Total number of advertised products	13 104
Number products advertised on TV	3 586

Source: Gallup AdFact; State Agency for Statistics (GosKomStat);
*GROSS figures are based on published ratecards and include VAT at 20%. **NET figures are official 1999 expert estimates by Russian Association of Advertising Agencies (RAAA).
***Total adspend figures include Press, TV, Radio, Outdoor and Internetdirect.

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



Total TV Revenue
in million RUR: 48 624
in million EUR: 1 959

TOP 10 ADVERTISING FIGURES GROSS				
TV Advertising Sectors	4 Media*	Television	Spent in TV	Share of TV Expenditure
CONFECTIONERY	8 103	8 064	99.5%	16.6%
SOFT DRINKS AND BEER	7 846	7 513	95.8%	15.5%
PERSONAL HYGIENE	5 960	5 900	99.0%	12.3%
FOOD	5 084	4 950	97.4%	10.2%
CLEANERS AND DETERGENTS	3 616	3 600	99.6%	7.4%
CORPORATE ADVERTISING	4 478	3 557	79.4%	7.3%
ENTERTAINMENT	4 056	3 079	75.9%	6.3%
COSMETICS	2 151	1 879	87.4%	3.9%
MEDIA	2 453	1 689	68.9%	3.5%
HOUSEHOLD APPLIANCES	1 987	1 644	82.7%	3.4%
OTHERS	17 343	6 749	38.9%	13.7%
TV Advertisers				
PROCTER & GAMBLE	6 254	6 220	99.5%	12.8%
NESTLE	3 718	3 651	98.2%	7.5%
MARS-RUSSIA	2 827	2 801	99.1%	5.8%
WRIGLEY	1 899	1 899	100.0%	3.9%
UNILEVER	1 891	1 869	98.9%	3.8%
DANDY	1 748	1 746	99.9%	3.6%
COCA-COLA	1 264	1 217	96.3%	2.5%
PEPSI CO	1 225	1 198	97.8%	2.5%
WIMM-BILL-DANN	927	901	97.1%	1.9%
DANONE	860	860	100.0%	1.8%
OTHERS	40 464	26 262	64.6%	54.0%
Total (in million RUR)	63 077	48 624	77.1%	100.0%
Total (in million EUR)	2 542	1 959	77.1%	100.0%

The year 1999 was a year of changes on the slovak media market. Parliamentary elections during 1998, a successful change of political situation and a packet of economic measures all had an influence on the advertising market in Slovakia. The stunted growth of investments to advertising was observed at the beginning of the year; advertising rates did not alter from the previous year and so were effectively reduced as supply topped demand. More and more companies began to display symptoms of economic recession.

Until 1995, the only television station on the slovak market was Slovak Television. The first private broadcaster on the territory of Slovak republic, VTV, was launched in October 1995 but only aired its programme through cable net and satellite. This meant that VTV's coverage and reach were, from the beginning, very limited. The launch of TV Markiza in 1996 meant the beginning of competition on the slovak TV market. Since November 1999, there has been a new private television broadcaster in cable net. TV Luna is satellite TV and has 36% penetration. The broadcaster offers a lot of talk shows, european movies, and documentary series. Most of them are BBC productions. The provider of Luna is a company called WN Danubius Film Ltd.

In 1999, TV Markiza was the most popular station with 62% audience share. Over the past two years, the market share of STV decreased rapidly. According to the latest research, STV has 15% audience share during all day (channel STV 1 has 13% and channel STV 2 has 2% audience share). Audience share for new broadcaster Luna is approximately 2 %. VTV which had about 1-2% audience share was closed during February this year.

At the end of 1999, HBO carried out a large advertising campaign. Thanks to this they won almost 20 000 new households as subscribers.

Programming

The key event for the slovak television market in 1999 was the change of management in Slovak television. The new programme structure which is valid from April '99, should stabilize the position of STV on the advertising market. Many programmes with low ratings were cancelled and replaced by new ones. But the main problem remained – the shortage of financial means in STV. Due to this, STV's programming could not compete with Markiza's programme. Slovak entertainment programmes are among the top programmes on television; TV Markiza, therefore, began broadcasting entertainment programmes every evening at 20:00, followed by movies or series.

TV audience measurement

Daily audience research is carried out by two domestic institutions. STV has its own department DKV STV and Markiza's research is organised by association VISIO. The first negotiations concerning the introduction of

peoplemeters began last summer. The main problem is a lack of funds.

TV advertising

Advertising restrictions did not change during last year. On public television it is prohibited to interrupt a television programme but TV Markiza, as private broadcaster, can situate the advertising spots directly into the programme. Advertising time on public TV may not exceed 3% of the total broadcasting time of the channel and the private TV stations are permitted to broadcast advertising for up to a daily maximum of 10% of total broadcast time. Advertising of prescription drugs is limited and advertising of tobacco and alcohol – with the exception of beer is prohibited.

A decrease of STV's audience share by 25% and the aggressive financial offer of TV Markiza forced the public broadcaster to look for new commercial strategies. Slovak television offers classical spots and sponsoring on both its channels and has recently begun offering the sponsoring of jingles as well. The STV commercial policy is based on offering the following discounts: Volume discounts depending on the size of the client's budget and its split between STV and Markiza. The size of these discounts is relatively large because of the commercial policy of TV Markiza focused on getting 100% of clients' budget. Guaranteed GRP – this service is offered to all larger clients who accept the rating of STV research. Special season offers aimed at clients who only advertise during part of the year.

Due to the difficult economic situation of the Slovak republic, advertising expenditure grew very slowly last year. According to monitoring company ANR, slovak adspend reached about 177 billion. TV took an estimated 45% of the total advertising. The financial share of Slovak television is about 20% of the advertising expenditure.

Slovakia

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General Data

COUNTRY	
Land area (km ²)	49 036
Total population	5 383 000
Number of households	1 822 000
Average household size	3.0
In % of households equipped	
Phone	71.3
Mobile telephone subscribers	16.3
PC's	14.0
Internet	2.5
Internet user, last month	10.5

ECONOMICS	
GDP in million SKK (at current prices)	717 400
GDP per capita in SKK (at current prices)	133 271
Inflation rate in 1999 (in %)	11.8
Value of SKK in Euro (EUR)*	1 EUR = 42.42 SKK
Value of SKK in US-Dollar (USD)*	1 USD = 43.23 SKK
Source: MML MEDIAN-AISA Slovakia	
*December 1999	

TV OVERVIEW	
Total number of TV households (TVHH)	1 811 000
In % of all households	99.4
Numbers of channels received by 70% of the population	3
TV License-Fee cost per year	SKK 900.-/EUR 21.-

TV EQUIPMENT	
	in % of TVHH
Colour TV	94.3
Multiset (homes with more than 1 TV set)	36.7
VCR	32.3
Teletext	30.7
Remote control	98.6

Source: MML MEDIAN-AISA Slovakia, May-Dec. 1999 '1998 (Statistical Yearbook 2000; European Audiovisual Observatory)

TV DISTRIBUTION	
	in % of TVHH
Cable	passed 31.8
	connected ¹ 25.5
Satellite	private dish/DTH 28.1
	collective dish/SMATV 20.0
Terrestrial	analog n.a.
	digital n.a.
	MMDS n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	90 000	Digital TV subscribers	n.a.

Source: MML MEDIAN-AISA Slovakia, May-Dec. 1999

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
STV 1	1956	T, C	99%	Slovak	98	Generalist	L-F, Adv.	IPBratislava
STV 2	1973	T, C	97%	Slovak	92	Generalist	L-F, Adv.	IPBratislava

Source: MML MEDIAN-AISA Slovakia, Sept.-Dec. 1999

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
MARKIZA	1996	T, C	91%	Slovak	142	Generalist	Adv.	In-house
LUNA	1999	S, C	36%	Slovak	84	Generalist	Adv.	In-house
VTV*	1995	S, C	36%	Slovak	119	Generalist	Adv.	In-house

Source: MML MEDIAN-AISA Slovakia, Sept.-Dec. 1999

*was closed in february 2000

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
TNT CARTOON	Private	C, S	26%	English	Old movies/cartoons	Adv.
CNN	Private	C, S	16%	English	News	Adv.
EUROSPORT	Private	C, S	34.4%	German	Sport	Adv.
MTV EUROPE	Private	C, S	16.2%	German	Music	Adv.
ARTE	Public	C, S	8.1%	German	Cultural	L-F
EURONEWS	Private	C, S	11.4%	German	News	Adv.
3 SAT	Public	C, S	14.1%	German	Generalist	L-F
BBC WORLD	Private	C, S	10.4%	English	News	Adv.
DEUTSCHE WELLE	Public	C, S	5.3%	German	Generalist	L-F
HALLMARK	Private	S	10.6%	English	Fiction	Sub.
SKY NEWS	Private	C, S	10.4%	English	News,	Adv.

Sources: MML MEDIAN-AISA Slovakia, Sept.-Dec. 1999.

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
CT 1	Public	C, T	41.7%	Czech	Generalist	L-F, Adv.
CT 2	Public	C, T	29.8%	Czech	Generalist	L-F, Adv.
NOVA	Private	C, T	38.1%	Czech	Generalist	Adv.
PRIMA	Private	C,T	26.7%	Czech	Generalist	Adv.
GALAXIE	Private	C, S	17.1%	Czech	Generalist	Adv.
PRO 7	Private	C, S	38.2%	German	Generalist	Adv.
SAT 1	Private	C, S	32.6%	German	Generalist	Adv.
RTL 2	Private	C, S	29.9%	German	Generalist	Adv.
MAGYAR TV 1	Public	C, S	29.5%	Hungary	Generalist	L-F, Adv.
MAGYAR TV 2	Public	T	23.1%	Hungary	Generalist	L-F, Adv.
DSF	Private	C, S	22.3%	German	Sport	Adv.
VIVA	Private	C, S	21.2%	German	Music	Adv.
VOX	Private	C, S	20.9%	German	Generalist	Adv.
ORF 1	Public	C, T	20.8%	German	Generalist	L-F, Adv.
RTL	Private	C, S	17.7%	German	Generalist	Adv.
ORF 2	Public	C, T	16.9%	German	Generalist	L-F, Adv.
ZDF	Public	C, S	16.3%	German	Generalist	L-F, Adv.
SUPER RTL	Private	C, S	15.5%	German	Entertainment	Adv.
POLSAT	Private	C, S	13.9%	Polish	Generalist	Adv.
ARD	Public	C, S	12.8%	German	Generalist	L-F, Adv.
RTL KLUB	Private	C, S	12.6%	Hungarian	Generalist	Adv.
DUNA TELEVIZIO	Public	C, S	9.4%	Hungarian	Generalist	L-F, Adv.
KABEL 1	Public	C, S	9.1%	German	Generalist	Adv.
TV 5	Public	C, S	8.2%	French	Generalist	L-F, Adv.
PR TV 1	Public	C, T	7.5%	Polish	Generalist	L-F, Adv.
UKRAINA TV	Public	T	4.6%	Ukrainian	Generalist	Adv., State
PR TV 2	Public	C, T	4.3%	Polish	Generalist	L-F, Adv.
MCM	Private	C, S	3.9%	French	Music	Adv.

Sources: MML MEDIAN-AISA Slovakia, Sept.-Dec. 1999

PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
HBO	1997	C	30.000	Czech	120	Movie,	299.- Skk	Sub.	n.a.
MAX 1	1997	C	30.000	Czech	105	Documentary	n.a.	Sub.	TMS Praha
SUPER MAX	1997	C	30.000	Czech	85	Children	n.a.	Sub.	TMS Praha

Sources: SKT-Slovak cable television, IP estimation

Viewing Patterns

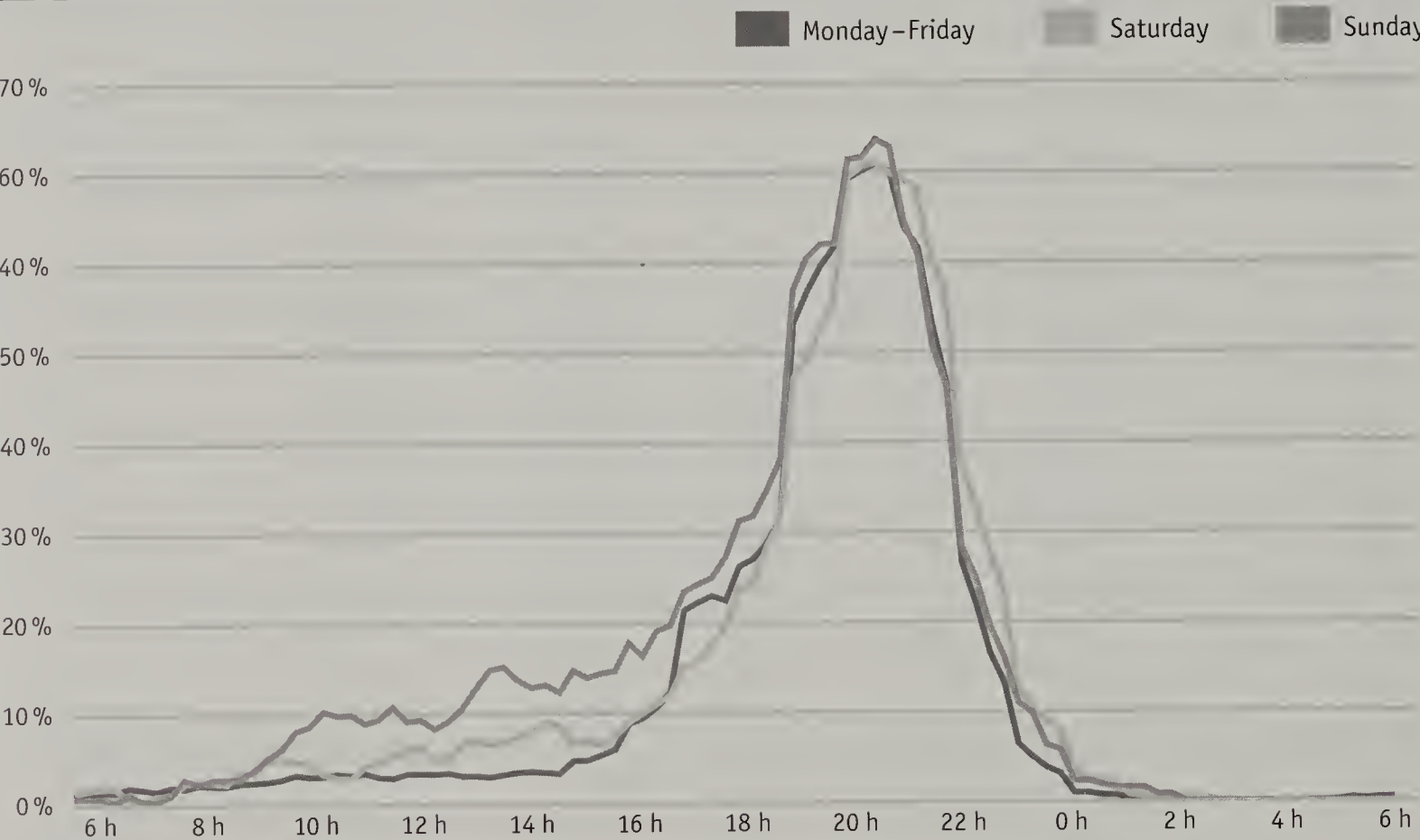
AUDIENCE MEASUREMENT

Name of the Service and Institute:	MML Median-AISA Slovensko
Panel/Sampling Size	2 145 individuals
Instrument used (people-meter, telefon, face-to-face)	face to face
	Population size in 000
Adults 14+	4 149
Main Purchase Responsibles	2 110
Housewives	1 780
Young Adults 14-29	1 370

Sources: MML MEDIAN-AISA Slovakia, Sept.-Dec. 1999

TOTAL TV RATING 1999

Adults Age: 14+

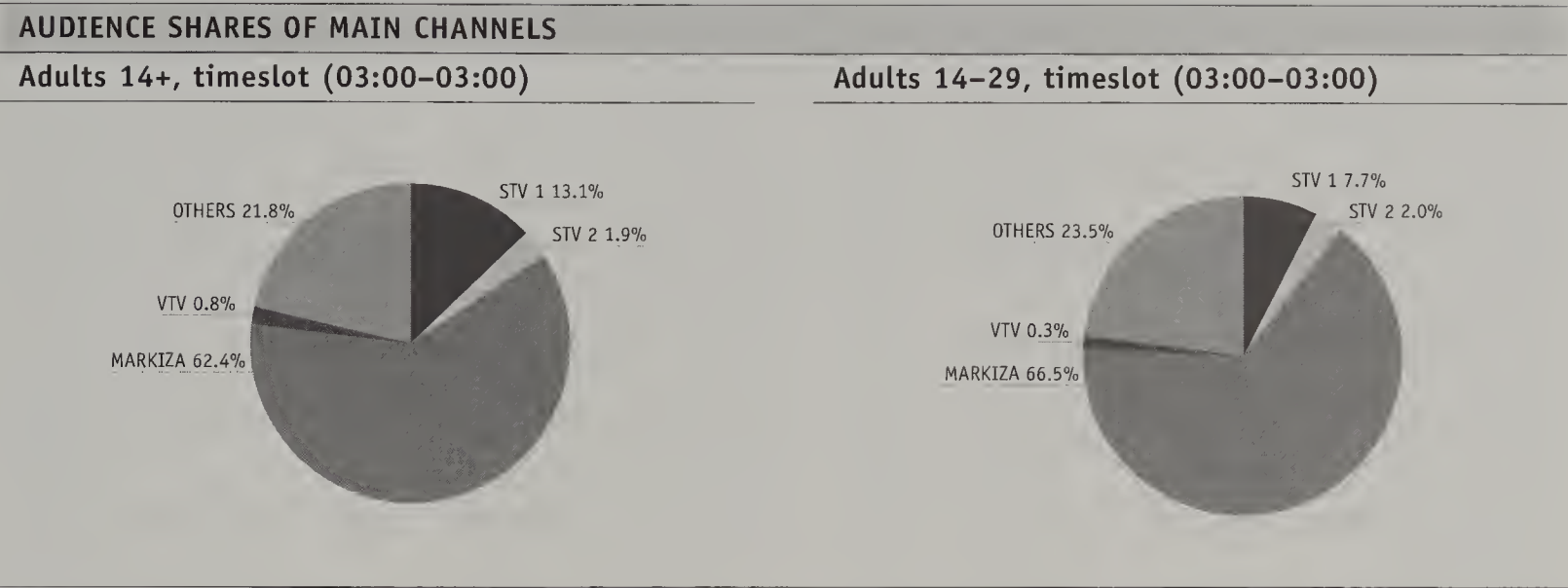


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)

	Adults 14+			Main Purchase Responsibles			Young Adults 14-29			Housewives		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	91.0	92.0	91.0	91.0	93.0	91.0	87.0	91.0	89.0	n.a.	93.0	91.0
Viewing time per Viewer	220	202	190	225	209	198	210	196	175	n.a.	209	199
Viewing time per Individual	199	185	173	205	194	180	183	178	156	n.a.	194	181

Sources: MML MEDIAN-AISA Slovakia, Sept.-Dec. 1999

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 03:00 – 03:00								
	Adults 14+		Young Adults 14–29		Main Purchase Responsibles		Housewives	
	1998	1999	1998	1999	1998	1999	1998	1999
STV 1	19.3%	13.1%	13.6%	7.7%	21.9%	14.4%	n.a.	14.0%
STV 2	2.9%	1.9%	2.3%	2.0%	3.0%	1.8%	n.a.	1.3%
MARKIZA	58.0%	62.4%	63.0%	66.5%	54.9%	62.1%	n.a.	63.7%
VTV	1.0%	0.8%	0.9%	0.3%	1.2%	1.2%	n.a.	0.9%
OTHERS	23.0%	21.8%	20.2%	23.5%	19.0%	20.5%	n.a.	20.1%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 14+		Young Adults 14–29		Main Purchase Responsibles		Housewives	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6–19 h	19–22 h	6–19 h	19–22 h	6–19 h	19–22 h	6–19 h	19–22 h
STV 1	10.1%	15.5%	8.8%	8.0%	10.3%	17.6%	8.9%	17.3%
STV 2	2.3%	1.8%	2.6%	1.6%	2.2%	1.8%	1.4%	1.2%
MARKIZA	65.2%	61.7%	63.8%	66.5%	68.7%	59.8%	69.0%	61.7%
VTV	0.5%	1.0%	0.2%	0.3%	0.5%	1.5%	0.6%	1.0%
OTHERS	21.9%	20.0%	24.6%	23.5%	18.2%	19.4%	20.1%	18.7%

Sources: MML MEDIAN–AISA Slovakia, Sept.–Dec. 1999

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
MISS SLOVAKIA 1999	Slovakia	STV 1	Variety Show	20:03	06/03	39.1%	42.8%
NEWS OF STV	Slovakia	STV 1	News	19:30	06/10	38.1%	56.9%
GÓLY-BODY-SEKUNDY	Slovakia	STV 1	Sport	19:47	10/10	35.3%	53.1%
SPORT	Slovakia	STV 1	Sport	19:52	28/09	35.3%	55.1%
PACIFIC BLUE	USA	STV 1	Series-Crime	20:06	07/04	33.7%	41.4%
ELECTION OF PRESIDENT OF SLOVAKIA	Slovakia	STV 1	Debates	20:00	11/05	33.5%	39.1%
BLEEDING HEARTS	Canada	STV 1	Movie	20:06	18/12	31.6%	40.4%
EVENING OF MILAN MARKOVIC	Slovakia	STV 1	Talk Show	21:25	06/03	31.2%	38.8%
JESUS II	Italy, France	STV 1	Movie	19:31	26/12	31.1%	33.5%
JOSHUA'S HEART	Canada	STV 1	Movie	20:04	15/05	29.3%	38.2%
LITTLE BUDHA	UK/France	STV 1	Movie	20:04	10/01	28.2%	39.3%
UNCLE RAGAN	Slovakia	STV 1	Movie	15:50	25/04	28.1%	57.6%
LES AMAZONES	France	STV 1	Movie	20:04	01/05	27.4%	32.5%
THE CAMP OF FALLEN WOMAN	Slovakia	STV 1	Movie	20:01	08/02	26.9%	29.6%
TWO WOMEN	France	STV 1	Movie	20:04	27/03	26.1%	32.2%
DAS HAUS AN DER KUESTE	Germany	STV 1	Movie	20:07	11/12	25.4%	30.7%
DONNA DONORE	Italy	STV 1	Series-Family	20:06	11/04	25.0%	30.0%
MAHARAJA'S DAUGHTER	Italy	STV 1	Movie	20:05	10/04	24.8%	28.3%
CRISS CROSS	Slovakia	STV 1	Magazine	21:51	15/08	24.6%	26.4%
JESUS I	Italy/France	STV 1	Movie	20:07	11/12	24.5%	32.9%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
BLEEDING HEARTS	Canada	STV 1	20:06	18/12	31.6%	40.4%
JOSHUA'S HEART	Canada	STV 1	20:04	15/05	29.3%	38.2%
LITTLE BUDHA	UK, France	STV 1	20:04	10/01	28.2%	39.3%
LES AMAZONES	France	STV 1	15:50	25/04	28.1%	57.6%
THE CAMP OF FALLEN WOMAN	Slovakia	STV 1	20:04	01/05	27.4%	32.5%
TWO WOMEN	France	STV 1	20:01	08/02	26.9%	29.6%
DAS HAUS AN DER KUESTE	Germany	STV 1	20:04	27/03	26.1%	32.2%
HEARTS ON FIRE	USA	STV 1	20:05	28/03	24.2%	30.0%
HARLEQUINE	USA	STV 1	20:03	21/12	23.5%	31.9%
RIDER	Canada	STV 1	20:03	18/09	23.5%	29.2%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL EU CHMP SLOVAKIA-RUMANIA		STV 2	20:00	04/09	14.5%	18.6%
FBAL SLOVAKIA-ISRAEL		STV 2	20:06	18/08	14.1%	21.3%
FBAL UEFA DUKLA B.BYSTRICA-AJAX		STV 2	19:56	30/09	11.2%	16.7%
FBAL MANCHESTER UNITED-LAZIO ROME		STV 2	20:37	27/08	10.3%	17.5%
HOCKEY LEAGUE		STV 2	16:56	09/04	10.2%	28.2%
FBAL EU CHMP SLOVAKIA-HUNGARY		STV 2	17:50	31/03	9.8%	17.5%
FBAL LAZIO ROME-REAL MALLORCA		STV 2	20:35	19/05	8.7%	15.4%
HOCKEY CZECHO-SLOVAKIA-RUSSIA		STV 2	16:25	08/08	8.7%	27.7%
FBAL EU CHMP SLOVAKIA-LICHTENSTEIN		STV 2	15:50	08/09	7.6%	28.4%
FBAL UEFA SPARTAK TRNAVA-GAK GRAZ		STV 2	17:55	30/09	7.5%	15.6%

Source: Research Dep. of Slovak TV

Top Programmes Channel by Channel

STV 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
EVENING OF MILAN MARKOVIC	Slovakia	Talk Show	14	20:04	60	22.0%	29.0%
PACIFIC BLUE	USA	Series-Crime	57	20:05	50	21.0%	28.0%
FRAGRANCE OF THE FLOWER & WIND	France	Series-Family	14	20:05	50	20.0%	27.0%
SHADOW OF SPARROW-HAWK	UK	Series-Family	13	20:04	50	17.0%	22.0%
DONNA DONORE	Italy	Series-Family	6	20:04	50	16.0%	22.0%
FAMILIE FUER SCHWESTER MARIA	Germany	Series-Family	4	20:04	90	16.0%	23.0%
AMICO MIO	Italy	Series-Family	8	20:07	90	16.0%	23.0%
ALZBETA'S YARD	Slovakia	Series-Family	6	20:56	60	14.0%	24.0%
SIRENS	USA/Can.	Series-Crime	26	20:05	45	14.0%	20.0%
SPEED WHEELS	Canada	Series-Family	20	20:04	50	14.0%	20.0%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MISS SLOVAKIA 99	Slovakia	Variety Show	06/03	20:03	90	36.7%	42.8%
JESUS II	Italy/Fra.	Movie	26/12	19:31	90	31.1%	33.5%
BLEEDING HEARTS	Canada	Movie	18/12	20:06	90	29.8%	40.4%
ROUND TABLE-ELECTION OF PRESID.	Slovakia	Debates	11/05	20:00	90	29.6%	39.1%
LITTLE BUDHA	UK/France	Movie	10/01	20:04	90	28.2%	39.3%
JOSHUA'S HEART	Canada	Movie	15/05	20:04	90	26.6%	38.2%
LES AMAZONES	France	Movie	01/05	20:04	90	25.2%	32.5%
UNCLE RAGAN	Slovakia	Movie	25/04	15:50	60	24.7%	57.6%
JESUS I	Italy/Fra.	Movie	25/12	19:29	90	24.5%	32.9%
DAS HAUS AN DER KUESTE	Germany	Movie	11/12	20:07	90	23.7%	30.7%

Source: Research Dep. of Slovak TV

STV 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
WEST HOCKEY LEAGUE	Slovakia	Sport Magazine	10	16:50	60	6.5%	17.1%
MAYBE MAGICIAN WILL COME	Czech Rep.	Variety Show	8	20:00	60	5.7%	8.2%
TANGO	Slovakia	Sport Magazine	32	21:15	55	5.0%	9.3%
EUROPEAN LEAGUES	Slovakia	Sport Magazine	37	20:35	50	4.7%	6.9%
MARS LEAGUE	Slovakia	Sport Magazine	21	16:25	90	4.7%	17.6%
TELERISK	Slovakia	Game Show	183	18:30	15	4.4%	7.8%
PRESSCLUB	Slovakia	Magazine	38	20:00	60	3.9%	5.2%
NEWS OF STV	Slovakia	News	180	21:30	20	3.7%	6.9%
MOTORMAGAZIN SPORT	Slovakia	Sport Magazine	24	20:50	30	2.9%	5.0%
AUTO MOTO REVUE	Slovakia	Sport Magazine	25	20:50	30	2.5%	4.4%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL EU CHMP SLOVAK.-RUMAN.		Sport	04/09	20:00	90	14.2%	18.4%
FBAL SLOVAKIA-ISRAEL		Sport	18/08	20:06	90	13.6%	21.0%
HITLER'S DEATH	UK	Documentary	08/09	20:01	50	13.4%	19.1%
KUBO	Slovakia	Movie	23/12	20:00	70	13.0%	17.2%
RYSAVÁ JALOVICA	Slovakia	Movie	31/12	14:38	70	12.7%	36.9%
HOCKEY LEAGUE*	Slovakia	Sport	13/04	16:53	90	12.1%	27.4%
HOCKEY LEAGUE*	Slovakia	Sport	14/04	16:52	90	12.0%	26.6%
WHITE ELEPHANT	Canada	Movie	24/12	19:26	100	11.7%	15.9%
FBAL UEFA CUP**		Sport	30/09	19:56	90	10.8%	17.7%
HOCKEY LEAGUE		Sport	16/11	17:26	60	8.9%	19.5%

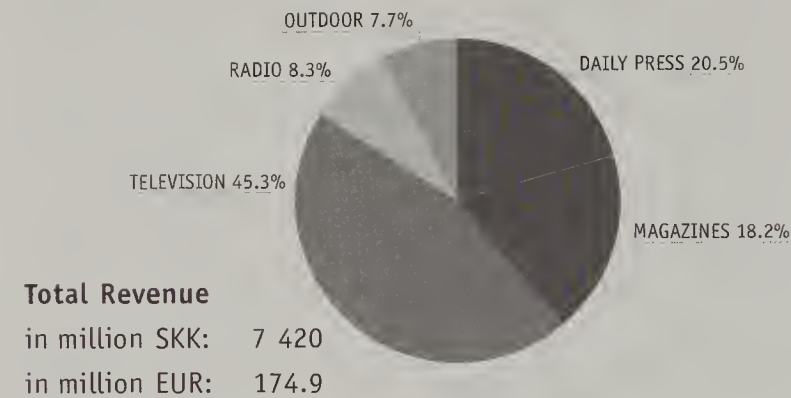
Source: Research Dep. of Slovak TV

*VSIKOŠICE-SLOVAN HARVARD **DUKLA B.BYSTRICA-AJAX

Advertising Expenditure

ADVERTISING FIGURES	GROSS	NET
Total adspend (in million SKK)	7 420	3 750
Total adspend (in million USD)	175.7	88.8
Total adspend (in million EUR)	174.9	88.4
TV adspend (in million SKK)	3 361	1 699
TV adspend (in million USD)	79.6	40.2
TV adspend (in million EUR)	79.2	40.1
TV adspend in % of GDP	0.47	0.24
TV adspend per capita (USD)	14.8	7.5

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

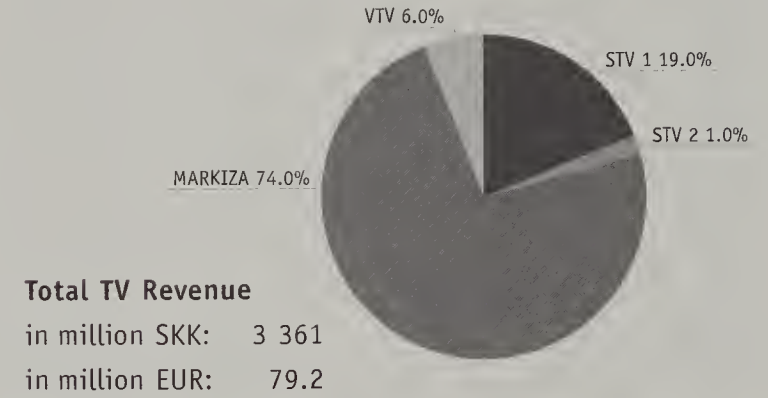


Sources: IP estimation, A CONNECT

TV ADVERTISING STATISTICS	
Total number of spots broadcast	89 700
Average spot length (in sec.)	23
Total number of advertisers	3 845
Number of TV advertisers	459
Total number of advertised products	6 371
Number products advertised on TV	1 264

Sources: AC Nielsen, Strategie 2000. A CONNECT

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	5 Media	Television	Spent in TV	Share of TV Expenditure
TELECOMUNICATION	471	330	70%	9.8%
INSURANCES	347	240	69%	7.1%
INVESTMENTS	292	190	65%	5.7%
CARBONATED DRINKS	204	162	79.4%	4.8%
DETERGENS	177	160	93.9%	4.8%
BANK SERVICES	254	154	60.7%	4.6%
BISCUITS	192	145	75.5%	4.3%
PERSONAL CARS	299	132	44.2%	3.9%
CHOCOLATES	155	125	80.6%	3.7%
NEWSPAPERS AND MAGAZINES	192	105	54.6%	3.1%
OTHERS	4 837	1 618	33.5%	48.1%
TV Advertisers				
PROCTER & GAMBLE	260	251	97%	7.5%
DRUKOS	218	174	80%	5.2%
UNILEVER	186	168	90%	5.0%
JACOBS SUCHARD FIGARO	170	152	89%	4.5%
THE COCA COLA COMP.	172	148	86%	4.4%
DANONE ČOKOLÁDOVNY	150	145	97%	4.3%
GLOBTEL	194	135	70%	4.0%
WRIGLEY	131	131	100%	3.9%
HENKEL	131	130	99%	3.9%
EUROTEL	219	127	58%	3.8%
OTHERS	5 589	1 800	32%	53.6%
Total (in million SKK)	7 420	3 361	45.0%	100.0%
Total (in million EUR)	174.9	79.2	45.0%	46.8%

Source: AC Nielsen, Strategie 2000

By establishing competitive commercial television channels, seen throughout Slovenia, the monopoly of public television practically ended after 1992. A “dual system” developed and was virtually uncontrolled (unchecked broadcasting occurred on the RTV frequency). The Law on Mass Media (1994) was not essentially the best, because it did not define sanctions.

RTV Slovenia is a public broadcaster with two nationwide TV channels: SLO 1 and SLO 2. One half of all TV programmes broadcast are in-house productions. Each channel has its own programme profile: the first channel, SLO1, provides news and current affairs, light entertainment, children’s programmes, documentaries and films or serials with higher artistic levels. The second channel, SLO 2, provides sports, movies, series and music. The Sunday entertainment show “Zoom”, broadcast live, is the most popular show according to the tops tables. The main daily news (TV journal) is also at the top of the most watched programmes in Slovenia. Winter sports, football and basketball are favourites of the viewers. Since 1997, RTV Slovenia has offered its programmes on an Internet home page so they are available to the whole world. In addition, it also began broadcasting its programmes by satellite Hot Bird 5 (Eutelsat) in the same year using digital technology. The pioneering work for both projects was done in Slovenia.

The basic mission of the channel POP TV, as the leading commercial television broadcaster in Slovenia, is to offer the possibility of choice to the viewers, which is the foundation of the development and pluralization in the modern democratic media sphere. The success of the channel has also boosted the advertising industry in Slovenia. POP TV is produced by Pro Plus, a company with mixed ownership (CME and Slovenian partners). From the very beginning, the broadcaster has respected the latest programming and production trends, variety of contents and permanent development. But the main reason for POP TV’s success is in the choice offered to viewers which satisfies their varying wishes. The Slovenian audience is especially fond of series and true stories, local programmes, news and telenovelas. Consequently, POP TV is comparable to the best channels in the world and consists of family movies, popular series and comedies for the widest range of viewers (Friends, Ally McBeal, Sex in the City etc.), original or licensed shows and its original news programme (24 HOURS).

Kanal A, which was in 1991 Slovenian’s first commercial channel, is nowadays a company with mixed ownership (SBS and Slovenian partners). The programme offer consists of TV series and films, mainly imported from the USA.

After a turbulent period in TV audience measurement things are soon to stabilize. There are only two suppliers of daily audience measurements: AGB Media Services (part of AGB Italia Group) providing peplemeter systems, and CATI Center using the CATI audience measurement method. The tendency is towards people-

meters, as they offer more detailed information regarding audience fluctuation and demographics. There is also another TV audience research project, conducted twice annually by Mediana Research Institute as part of a more holistic media audience measurement.

It should be mentioned that there are still no restrictions concerning advertising on public channels. This is now one of the main issues in the procedure of adopting a new Media Law. Compared to European standards and market conditions, broader commercial competition was above average in the Slovenian TV market landscape and now the main topic concerning TV advertising is legislation: last year’s enforcement of the European Convention on Transfrontier Television and the adoption of the new Media Law. The draft of the latter has already been presented and sent to the parliamentary readings.

As far as the Convention is concerned, the SRDF (Slovenian Broadcasting Council) made a great effort to ensure that all Slovene TV stations adopt the Convention. Many of the stations are now in violation of this, particularly in the field of advertising. The Council insisted on cooperate discussion between all concerned and declared a period in which all violations should be suppressed. As some broadcasters are unwilling to respect the law, the Council has already suggested punishing them with the suspension of broadcasting frequencies for a period of time. Secondly there is a new media law, which is certain to bring changes in the media market, particularly in television. As commercial television stations were under great pressure from the Convention regarding TV advertising, the new law will inevitably bring more dramatical changes for public TV station TV SLO (advertising is an important source of income besides licence fees).

According to the Mediana Research Institute (Mediana IBO) the intensity of advertising expenditure growth is not as strong as it was. This year, the market share of television is more stable in comparison to 1998. The main players continue to be commercial television (POP TV and Kanal A, Gajba TV). Traditional advertising is the most frequently used sales product, while the variety of offers is slightly increasing (teletext, infomercials).

Slovenia

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General Data

COUNTRY	
Land area (km²)	20 256
Total population	1 999 000
Number of households	644 840
Average household size	3.1
In % of households equipped	
Phone	89.9
Mobile telephone subscribers	35.7
PC's	40.5
Internet access	n.a.
Internet user, last month	15.6*

Sources: Statistical Office of RS & BGP 2000/1. Media Research Institute, Ljubljana
*weekly (Mediana BGP)

ECONOMICS	
GDP in million SIT (at current prices)	3 636 000
GDP per capita in SIT (at current prices)	1 832 200
Inflation rate in 1999 (in %)	6.1
Value of SIT in Euro (EUR)	1 EUR = 197.4 SIT
Value of SIT in US-Dollar (USD)	1 USD = 181.9 SIT

Source: Chamber of Commerce and Industry of RS

TV OVERVIEW	
Total number of TV households (TVHH)	634 300
In % of all households	97.9
Numbers of channels received by 70% of the population	5
TV License-Fee cost per year	SIT 25 880.-/EUR 130.7

TV EQUIPMENT	
	in % of TVHH
Colour TV	98.1
Multiset (homes with more than 1 TV set)	22.5
VCR	58.7
Teletext	62.3
Remote control	96.0

Sources: Statistical Office of RS & BGP 2000/1. Media Research Institute, Ljubljana

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	45.7
	connected	42.9
Satellite	private dish/DTH	17.0
	collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

Sources: Statistical Office of RS & BGP 2000/1. Media Research Institute, Ljubljana

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
SLO 1	1958	T, C	97%	Slovene	127	Generalist	L-F, Adv.	In-house
SLO 2	1972	T, C	95%	Slovene	116	Sport, Doc., Series	L-F, Adv.	In-house

Sources: Radio and TV Programmes in Slovenia, SRDF (Broadcasting Council of the Republic Slovenia)

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
POP TV	1995	T, C	80%	Slovene	126	Series, Movies, News	Adv.	Pro Plus
KANAL A	1991	T, C	80%	Slovene	129	Series, Movies	Adv.	In-house
TV 3	1995	T, C	75%	Slovene	119	Series, Documentaries	Adv.	In-house
GAJBA TV	1997	T	50%	Slovene	70	Entertainment	Adv.	Pro Plus

Source: Radio and TV Programmes in Slovenia, SRDF

DOMESTIC CHANNELS (REGIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
TV KOPER–CAPODISTRIA	1971	T, C	40	Italian, Slovene	63	Generalist	L–F, Adv.	RTV SLO

Source: Radio and TV Programmes in Slovenia, SRDF

DOMESTIC CHANNELS (REGIONAL PRIVATE)							
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue
VAS KANAL	1990	T, C	15%	Slovene	56	Local news, Sport, Culture	Adv.
VTV	1991	T, C	44%	Slovene	63	Local news, Sport, Entert.	Adv.
TELVIZIJA CELJE	1994	T, C	15%	Slovene	28	Local news, Culture	Adv.
TV CENTER	1991	T, C	9%	Slovene	42	Local news, Culture	Adv.
TV PRIMORKA	1994	T, C	18%	Slovene	63	Local news, Sport, Entert.	Adv.
GORENJSKA TELEVIZIJA	1992	C	3%	Slovene	35	Local news, Culture	Adv.

Source: Radio and TV Programmes in Slovenia, SRDF

INTERNATIONAL/PAN EUROPEAN CHANNELS					
Channels	Nature	Diffusion	Language	Programming	Revenue
ANIMAL PLANET	Private	C, S	English	Documentary	Adv.
BBC PRIME	Public	C, S	English	Entertainment	Adv.
BBC WORLD	Private	C, S	English	News	Adv.
CNB EUROPE	Private	C, S	English	Economy	Adv.
CNN INT.	Private	C, S	English	News	Adv.
DISCOVERY	Private	C, S	English	Documentary	Adv.
EUROSPORT	Private	C, S	English	Sport	Adv.
MTV EUROPE	Private	C, S	English	Music	Adv.
NAT. GEOGRAPHIC	Private	C, S	English	Documentary	Adv.
TNT/CARTOON	Private	C, S	English	Old Movies/Cartoons	Adv.
TV 5 EUROPE	Public	C, S	French	Generalist	L–F, Spon.

Source: Astra Telekom Zirvnica-Moste

OTHER FOREIGN CHANNELS					
Channels	Nature	Diffusion	Language	Programming	Revenue
ARD	Public	C, S	German	Generalist	L–F, Adv.
DSF	Private	C, S	German	Sport	Adv.
HTV 1	Public	T, C, S	Croatian	Generalist	L–F, Adv.
HTV 2	Public	T, C, S	Croatian	Generalist	L–F, Adv.
HTV 3	Public	T, C, S	Croatian	Generalist	L–F, Adv.
ITALIA 1	Private	T, C	Italian	Generalist/Youth	Adv.
KABEL 1	Private	C, S	German	Generalist	Adv.
ORF 1	Public	T, C	German	Generalist	L–F, Adv.
ORF 2	Public	T, C	German	Generalist	L–F, Adv.
PRO 7	Private	C, S	German	Generalist	Adv.
RAI DUE	Public	T, C, S	Italian	Generalist	L–F, Adv.
RAI UNO	Public	T, C, S	Italian	Generalist	L–F, Adv.
RTL 2	Private	C, S	German	Generalist	Adv.
RTS	Public	C, S	Serbian	Generalist	L–F, Adv.
SAT 1	Private	C, S	German	Generalist	Adv.
SUPER RTL	Private	C, S	German	Enetrtainment	Adv.
TELE 5	Private	C, S	Spanish	Generalist	Adv.
VIVA	Private	C, S	German	Music	Adv.
VIVA 2	Private	C, S	German	Music	Adv.
VOX	Private	C, S	German	Generalist	Adv.
ZDF	Public	C, S	German	Generalist	L–F, Adv.

Source: Astra Telekom Zirvnica-Moste

Viewing Patterns

AUDIENCE MEASUREMENT*		
Name of the Service and Institute:	IRM, MEDIANA (MEDIANA TeVe)	
Panel/Sampling Size	300 individuals per day	
Instrument used (people-meter, telefon, face-to-face)	Telefon	
	Population size in 000	
Individuals 10–75	1 685	
Adults 20–75	1 410	
Young Adults 20–49	910	
Children 10–19	275	

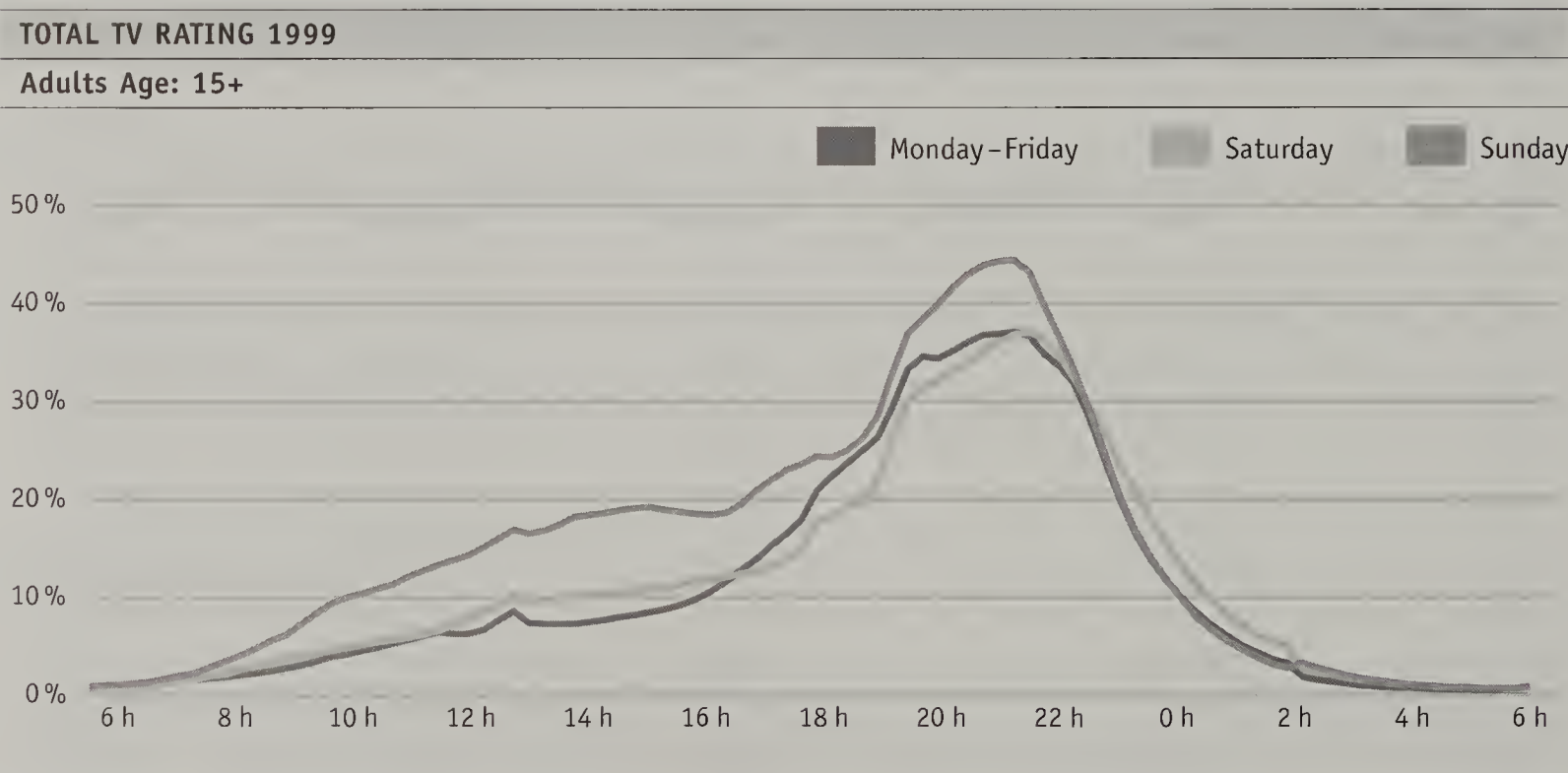
Source: Statistical Office of the Republic Slovenia

*Base for 1998 data

AUDIENCE MEASUREMENT**		
Name of the Service and Institute:	MEDIA SERVICES AGB IRM	
Panel/Sampling Size	450 households	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	1 793	
Adults 15+	1 536	
Main Purchase Responsible 25–50	226	
Housewives 25–50	351	
Young Adults 18–49	913	
Children 4–14	257	

Sources: EURODATA TV/MEDIA RESEARCH INSTITUTE MEDIANA (MEDIANA Teve)

**Base for 1999 data

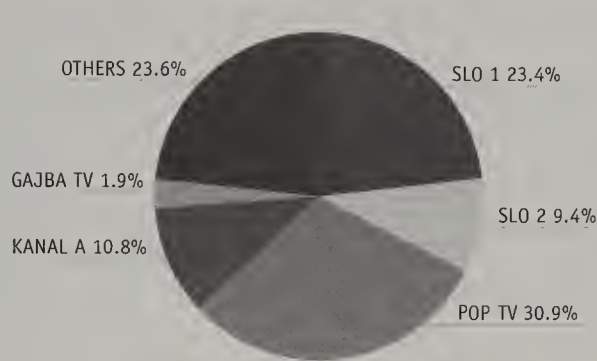


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)								
	Adults		Young Adults 18–49		Children 4–14		Housewives	
	1998*	1999**	1998*	1999**	1998*	1999**	1998*	1999**
Daily reach in %	62.5	69.8	60.3	68.1	n.a.	67.8	60.3	71.2
Viewing time per Viewer	151	232	153	n.a.	n.a.	190	144	228
Viewing time per Individual	95	163	92	n.a.	n.a.	131	87	163

Source: *Media Research Institute (Mediana Teve), Adults 20–75; **EURODATA TV/MEDIA RESEARCH INSTITUTE MEDIANA (MEDIANA Teve) Adults 15+

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS	
Adults 15+, all day (07:00–02:00)	Young Adults 18–49, all day (07:00–02:00)



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 07:00–02:00								
	Adults 18–75		Young Adults 18–49		Children 4–14		Women 25–50	
	1998*	1999**	1998*	1999**	1998*	1999**	1998*	1999**
SLO 1	24.0%	23.4%	16.9%	10.5%	n.a.	19.0%	21.0%	18.3%
SLO 2	11.8%	9.4%	11.8%	9.2%	n.a.	7.6%	7.0%	8.6%
POP TV	39.5%	30.9%	43.9%	48.9%	n.a.	28.7%	49.6%	37.1%
KANAL A	11.5%	10.8%	13.7%	12.0%	n.a.	14.8%	12.7%	13.7%
GAJBA TV	1.4%	1.9%	1.6%	0.8%	n.a.	1.2%	1.4%	2.0%
OTHERS	11.8%	23.6%	12.1%	18.6%	n.a.	28.7%	8.3%	20.3%

*Eurodata TV/Media Research Institute Mediana (Mediana Teve) Instrument used: Telephone
**Eurodata TV/Media Research Institute Mediana (Mediana Teve) Instrument used: people-meter

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 15+		Young Adults 18–49		Children 4–14		Women 25–50	
	Day Time 13–19 h	Prime Time 19–22 h	Day Time 13–19 h	Prime Time 19–22 h	Day Time 13–19 h	Prime Time 19–22 h	Day Time 13–19 h	Prime Time 19–22 h
SLO 1	17.0%	29.8%	12.1%	24.7%	12.4%	25.1%	13.8%	22.6%
SLO 2	10.9%	8.8%	16.4%	6.6%	8.3%	8.1%	9.8%	8.2%
POP TV	35.1%	30.2%	31.0%	32.0%	29.8%	29.0%	41.4%	36.9%
KANAL A	9.4%	11.3%	9.9%	15.7%	13.9%	16.9%	10.2%	14.9%
GAJBA TV	2.0%	1.8%	2.6%	2.3%	1.6%	1.4%	2.5%	1.9%
OTHERS	25.6%	18.1%	28.0%	18.7%	34.0%	19.5%	22.3%	15.5%

Source: Eurodata TV/Media Research Institute Mediana (Mediana Teve) Instrument used: people-meter

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
ZOOM	Slovenia	Slo 1	Comedy Show	20:05	19/12	29.5%	58.0%
TV JOURNAL	Slovenia	Slo 1	News	19:29	21/06	27.0%	55.1%
VREME	Slovenia	Slo 1	News	19:50	21/11	26.9%	52.0%
24 HOURS	Slovenia	Pop TV	News	19:14	26/12	25.4%	57.6%
MISS WORLD		Pop TV	Variety Show	21:00	04/12	24.9%	59.7%
CLINTON IN SLOVENIA	Slovenia	Slo 1	News	20:20	21/06	24.5%	50.4%
NEW YEAR SPEACH/PRESIDENT	Slovenia	Slo 1	News	19:50	31/12	23.9%	57.3%
MISS SLOVENIA	Slovenia	Pop TV	Variety Show	20:01	11/09	21.7%	55.3%
FBAL CL M. TEATANIC-B.LEVERKUSEN		Slo 2	Sport	20:36	22/09	20.7%	48.0%
OBZORNIK	Slovenia	Slo 1	News	18:00	21/11	19.9%	48.1%
FBAL PIVOVARNA LAŠKO-OLYMP. LYON		Slo 2	Sport	20:00	25/08	19.7%	51.5%
BEFORE THE CLINTON VISIT	Slovenia	Slo 1	News	15:14	21/06	19.3%	64.4%
THE PRIVELEGE OF LOVING	Mexico	Pop TV	Series	18:13	28/12	19.1%	52.4%
PO DOMAČE/NEW YEAR’S EVE	Slovenia	Slo 1	Variety Show	20:09	31/12	19.1%	45.8%
SOLAR ECLIPSE IN SLOVENIA	Slovenia	Slo 2	Documentary	12:30	11/08	18.8%	72.3%
WITH NEDA IN THE WORLD	Slovenia	Pop TV	Documentary	20:00	04/12	18.4%	44.6%
TV DOBER DAN	Slovenia	Pop TV	Series	20:03	13/12	18.4%	39.7%
POPE IN SLOVENIA	Slovenia	Slo 1	News	09:00	19/09	18.1%	73.0%
SLAVKA AVSENIKA 70 YEARS	Slovenia	Slo 1	Variety Show	20:05	29/12	18.1%	40.3%
LA USURPADORA	Mexico	Pop TV	Series	18:19	05/05	17.9%	65.6%

Source: EURODATA TV/MEDIA SERVICE AGB IRM

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
IF SOMEONE HAD KNOWN	USA	Pop TV	20:03	30/11	17.4%	41.2%
WHAT KIND OF MOTHER ARE YOU	USA	POP TV	20:01	09/11	17.2%	41.0%
THE BEVERLY HILLBILLIES	USA	Pop TV	19:59	21/05	16.5%	45.0%
SLEEPING WITH THE DEVIL	USA	Pop TV	20:01	12/10	15.9%	39.7%
HOME ALONE 2	USA	Pop TV	19:59	19/12	15.9%	30.8%
FIRST KNIGHT	USA	Pop TV	19:58	02/10	15.8%	42.3%
THE SECRET SHE CARRIED	USA	POP TV	20:00	07/12	15.8%	36.9%
BORN INTO EXILE	USA	Pop TV	20:02	28/12	15.7%	37.6%
STRIPTease	USA	Pop TV	19:59	08/05	15.5%	45.6%
BABY'S DAY OUT	USA	Pop TV	20:00	20/09	15.4%	37.8%

Source: EURODATA TV/MEDIA SERVICE AGB IRM

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL CL TEATANIC–LEVERKUSEN		Slo 2	20:36	22/09	20.7%	48.0%
FBAL CL M. PIVOVARNA LASKO OLYMPIQUE LYON		Slo 2	20:00	25/08	19.7%	51.5%
FBAL CL M. TEATANIC–DINAMO KIJEV		Slo 2	21:47	27/10	17.7%	45.7%
FBAL CL KIJEV UKRAJINA–SLOVENIJA		Slo 2	17:55	17/11	16.7%	41.0%
FBAL CL LEVERKUSEN–M. TEATANIC		Slo 2	21:45	02/11	16.5%	45.5%
FBAL CL LAZIO–M. TEATANIC		Slo 2	20:34	29/09	15.9%	40.4%
SKI SLALOM W. CUP (M)		Slo 2	20:36	13/12	14.8%	32.1%
FBAL CL KIJEV DINAMO–MARIBOR TEATANIC		Slo 2	20:31	14/09	14.3%	39.1%
FBAL CL MARIBOR TEATANIC–LAZIO		Slo 2	20:38	19/10	14.1%	34.5%
SKI SLALOM W. CUP (W)		Slo 2	18:05	20/11	14.0%	40.4%

Source: EURODATA TV/MEDIA SERVICE AGB IRM

Top Programmes Channel by Channel

SLO 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ZOOM	Slovenia	Comedy Show	25	20:05	164	29.5%	58.0%
TV JOURNAL	Slovenia	News	245	19:29	39	27.0%	55.1%
VREME	Slovenia	News	976	19:50	2	26.9%	52.0%
OBZORNIK	Slovenia	News	241	18:00	8	19.9%	48.1%
VRTIČKARJI	Slovenia	Series	10	21:42	28	17.8%	41.0%
ODMEVI	Slovenia	News	172	22:03	28	17.6%	47.1%
PETA HIŠA NA LEVI	Slovenia	Series	5	20:05	29	16.7%	40.1%
POROČILA	Slovenia	News	368	22:14	6	15.9%	37.1%
KOMMISSAR REX	Germany	Series	5	20:05	55	15.8%	44.5%
FORSTHAUS FALKENAU	Germany	Series	26	20:06	51	15.6%	34.1%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
CLINTON IN SLOVENIA	Slovenia	News	21/06	20:20	87	24.5%	50.4%
NEW YEAR SPEACH/PRESIDENT	Slovenia	n.a.	31/12	19:50	5	23.9%	57.3%
BEFORE THE CLINTON VISIT	Slovenia	News	21/06	15:14	26	19.3%	64.4%
PO DOMAČE/NEW YEAR’S EVE	Slovenia	Variety Show	31/12	20:09	60	19.1%	45.8%
POPE IN SLOVENIA	Slovenia	News	19/09	09:00	283	18.1%	73.0%
SLAVKA AVSENIKA 70 YEARS	Slovenia	Variety Show	29/12	20:05	66	18.1%	40.3%
SPEACH OF ARCHBISHOP	Slovenia	n.a.	24/12	19:53	5	16.9%	41.7%
CHARITY CONCERT/UNICEF	Slovenia	Variety Show	21/11	21:22	112	16.3%	42.5%
NEW YEAR’S 3X3	Slovenia	Game Show	26/12	20:01	96	15.9%	32.4%
KLIC DOBROTE	Slovenia	Variety Show	24/11	20:08	106	14.7%	32.9%

Sources: EURODATA TV/MEDIA SERVICES AGB IRM; Base: adults 15+

SLO 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
LINGO	Slovenia	Game Show	35	19:05	27	8.1%	19.8%
KNOCK	USA	Series	4	21:41	51	6.0%	14.9%
NAZISM HISTORY LESSON	UK	Documentary	6	21:03	48	5.8%	15.3%
WHEEL OF FORTUNE	Slovenia	Game Show	27	19:03	26	5.3%	15.0%
WILD SEA	USA	Series	4	20:02	51	5.2%	11.9%
ZVEZDE V ARENI	n.a.	Entertainment	5	17:45	105	5.0%	16.2%
STUDIO CITY	Slovenua	Magazine	29	21:00	92	5.0%	13.2%
ICE MAN	UK	Documentary	4	21:22	49	4.9%	11.9%
LETALONOSILKA TRDNJ. NA MORJU	n.a.	Documentary	5	21:04	53	4.6%	12.3%
DREVAK Z MOTORJEM	n.a.	Documentary	4	19:59	54	4.6%	9.6%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL TEATANIC-LEVERKUSEN	Slovenia	Sport	22/09	20:36	120	20.7%	48.0%
FBAL CL MARIBOR-LYON		Sport	25/08	20:00	153	19.7%	51.5%
SOLAR ECLIPSE IN SLOVENIA		Documentary	11/08	12:30	28	18.8%	72.3%
FBAL CL MARIBOR-KIJEV		Sport	27/10	21:47	60	17.7%	45.7%
FBAL KIJEV UKRAJINA-SLOVENIJA		Sport	17/11	17:55	122	16.7%	41.0%
FBAL CL LEVERKUSEN -TEATANIC	Slovenia	Sport	02/11	21:45	59	16.5%	45.5%
POPE IN SLOVENIA		News	19/09	19:04	27	15.9%	42.1%
FBAL CL LAZIO-TEATANIC		Sport	29/09	20:34	124	15.9%	40.4%
SKI SLALOM (M) W. CUP		Sport	13/12	20:36	59	14.8%	32.1%
FBAL CL KIJEV-TEATANIC		Sport	14/09	20:31	149	14.3%	39.1%

Sources: EURODATA TV/MEDIA SERVICES AGB IRM, Base: Adults 15+

POP TV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
24 HOURS	Slovenia	News	244	19:14	46	25.4%	57.6%
THE PRIVELEGE OF LOVING	Mexico	Ser.–Daily Soap	112	18:13	55	19.1%	52.4%
TV GOOD DAY	Slovenia	Series	10	20:03	60	18.4%	39.7%
LA USURPADORA	Mexico	Ser.–Daily Soap	62	18:19	50	17.9%	65.6%
VREME IN NOVICE	Slovenia	News	217	18:18	1	15.9%	62.3%
VIVO POR ELENA	Mexico	Series	5	17:26	51	13.9%	61.4%
LA FEMME NIKITA	USA	Serials Series	19	20:55	54	13.5%	32.2%
PRECIOSA	MEXICO	Ser.–Daily Soap	90	17:24	57	12.7%	58.9%
MUNECA BRAVA	Argentina	Ser.–Daily Soap	82	17:11	57	11.2%	41.6%
WALKER TEXAS RANGER III	USA	Series	27	22:12	52	11.0%	34.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MISS WORLD		Variety Show	04/12	21:00	126	24.9%	59.7%
MISS SLOVENIA	Slovenia	Variety Show	11/09	20:01	130	21.7%	55.3%
WITH NADA IN THE WORLD	Slovenia	Documentary	04/12	20:00	59	18.4%	44.6%
IF SOMEONE HAD KNOWN	USA	Movie	30/11	20:03	103	17.4%	41.2%
WHAT KIND OF MOTHER ARE YOU	USA	Movie	09/11	20:01	103	17.2%	41.0%
THE BEVERLY HILLBILLIES	USA	Movie	21/05	19:59	103	16.5%	45.0%
SLEEPING WITH THE DEVIL	USA	Movie	12/10	20:01	102	15.9%	39.7%
HOME ALONE 2	USA	Movie	19/12	19:59	130	15.9%	30.8%
FIRST KNIGHT	USA	Movie	02/10	19:58	144	15.8%	42.3%
THE SECRET SHE CARRIED	USA	Movie	07/12	20:00	104	15.8%	36.9%

Sources: EURODATA TV/MEDIA SERVICES AGB IRM; Base: adults 15+

KANAL A							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ZMENKARIJE	Slovenia	Entertainment	68	20:43	28	10.5%	23.9%
MLADOPOROČENCI	Slovenia	Entertainment	18	19:58	45	10.2%	24.5%
STARGATE	USA	Series	18	21:42	63	6.2%	18.2%
NIGHT SINS	USA	Series	4	21:40	47	6.0%	17.7%
A KILLING IN BEVERLY HILLS	USA	Series	4	21:40	51	5.6%	17.3%
CHARMED	USA	Series	17	21:06	53	5.6%	14.7%
ONLY FOOLS AND HORSES	UK	Series	48	22:35	39	5.2%	20.3%
MARIA ISABEL	Mexico	Ser.–Daily Soap	91	17:13	26	5.1%	20.8%
THE BLACK ADDER	UK	Series	24	23:03	39	5.0%	27.3%
BITTER BLOOD	USA	Series	4	21:44	52	5.0%	14.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
I POSED FOR PLAYBOY	USA	Movie	13/11	21:41	108	5.6%	19.1%
THE USUAL SUSPECTS	USA	Movie	23/05	20:03	118	5.6%	13.9%
A CASE FOR LIFE	USA	Movie	25/11	20:00	102	5.6%	12.9%
TRUE ROMANCE	USA	Movie	16/05	20:03	132	5.5%	12.4%
WEB OF DECEIT	USA	Movie	29/08	22:33	99	5.4%	29.6%
BAD COMPANY	USA	Movie	04/05	20:58	115	5.4%	16.0%
A SMILE LIKE YOURS	USA	Movie	07/07	20:03	100	5.4%	15.5%
LOVE LIVES ON	USA	Movie	17/05	21:05	107	5.4%	14.9%
NOTORIOUS	USA	Movie	11/05	21:02	103	5.3%	15.9%
HIT AND RUN	USA	Movie	02/12	19:59	99	5.3%	12.5%

Sources: EURODATA TV/MEDIA SERVICES AGB IRM

GAJBA TV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
POLICE ACADEMY	USA	Series	26	18:09	46	2.1%	6.8%
RETURN OF SANDOKAN	Italy	Series	4	10:32	93	1.8%	10.2%
BONDS OF LOVE	USA	Series	4	15:55	98	1.6%	5.9%
ALARM FOR COBRA 11	Germany	Series	31	18:01	50	1.5%	4.5%
BAYWATCH	USA	Series	28	21:01	48	1.4%	3.7%
RENEGADE	USA	Series	22	23:04	47	1.3%	8.7%
SOLDIER OF FORTUNE	USA	Series	20	17:57	49	1.3%	5.7%
TIK PRED ZLOČINOM	n.a.	Series	8	23:32	53	1.2%	7.8%
EARTH	USA	Series	20	17:01	49	1.2%	5.7%
TARGET: MAFIA	USA	Series	8	22:44	46	1.1%	6.0%

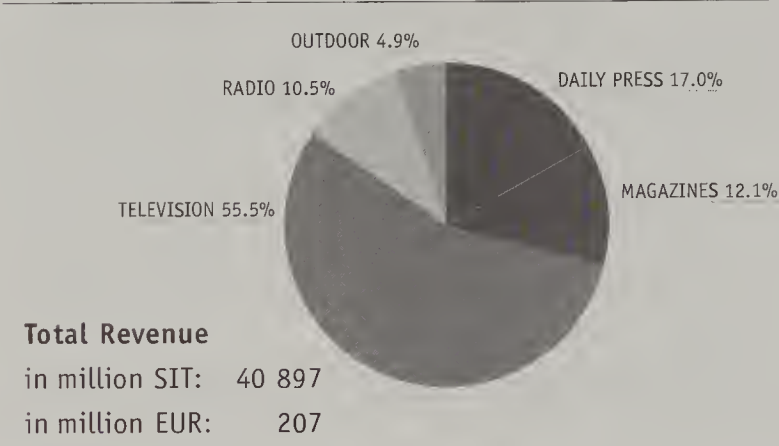
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
AGAINST THEIR WILL	USA	Movie	17/10	21:56	95	3.1%	11.4%
NAVY SEALS	USA	Movie	20/07	20:04	115	2.5%	10.5%
BLOW OUT	USA	Movie	09/05	21:56	106	2.4%	8.9%
CHARLES AND DIANA	USA	Movie	21/11	16:02	96	2.4%	7.7%
GODS MUST BE CRAZY	USA/Botsw.	Movie	25/07	20:00	102	2.4%	7.0%
COLOURS	USA	Movie	17/08	20:01	122	2.2%	7.4%
MISS SLOVENIA	Slovenia	Variety Show	30/08	20:03	112	2.2%	5.4%
FRENCH CONNECTION	USA	Movie	01/05	21:01	111	2.1%	5.8%
BATTLE OF THE BULGE	USA	Movie	06/05	19:59	146	2.1%	5.6%
TO DIE FOR	USA	Movie	14/10	20:06	99	2.1%	5.3%

Sources: EURODATA TV/MEDIA SERVICES AGB IRM; Base: adults 15+

Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million SIT)	40 897
Total adspend (in million USD)	225
Total adspend (in million EUR)	207
TV adspend (in million SIT)	22 714
TV adspend (in million USD)	125
TV adspend (in million EUR)	115
TV adspend in % of GDP	0.62
TV adspend per capita (USD)	63

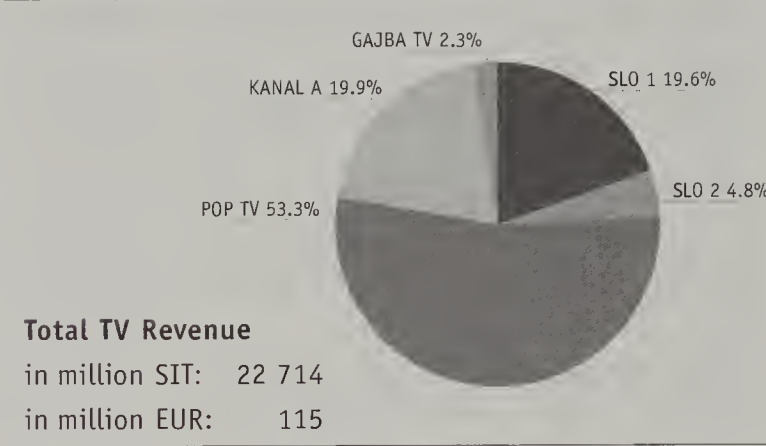
SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



TV ADVERTISING STATISTICS	
Total number of spots broadcast	301 440
Average spot length (in sec.)	n.a.
Total number of advertisers	8 330
Number of TV advertisers	1 275
Total number of advertised products	10 390
Number products advertised on TV	2 340

Source: Media Research Institute (Mediana Teve)

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	4 Media *	Television	Spent in TV	Share of TV Expenditure
HEALTH & HYGIENE/COSMETICS	5 701	4 960	87.0%	21.8%
NUTRITION & STIMULANTS	4 930	4 122	83.6%	18.1%
SERVICES	7 734	3 852	49.8%	17.0%
SPECIAL PRODUCTS	7 363	3 443	46.8%	15.2%
LEANING PRODUCTS	2 333	2 313	99.1%	10.2%
MOTORING	4 759	2 184	45.9%	9.6%
SHOPS & STORES	1 971	860	43.6%	3.8%
HOUSEHOLD APPLIANCES	958	574	59.9%	2.5%
TEXTILE GOODS	868	406	46.8%	1.8%
OTHERS	4 280	0	0%	0%
TV Advertisers				
PROCTER & GAMBLE	2 399	2 367	98.7%	10.4%
HENKEL SLOVENIJA	1 140	1 105	96.9%	4.9%
LOTERIJA SLOVENIJE	794	708	89.2%	3.1%
MOBITEL	753	708	94.0%	3.1%
TELEKOM SLOVENIJE	718	592	82.5%	2.6%
PORTNA LOTERIJA SLOVENIJE	716	495	69.1%	2.2%
BENCKISER	708	483	68.2%	2.1%
REVOZ	617	366	59.3%	1.6%
WRIGLWY	496	364	73.4%	1.6%
SIMOBIL	439	358	81.5%	1.6%
OTHERS	27 837	15 168	54.5%	66.8%
Total (in million SIT)	40 897	22 714	55.5%	100.0%
Total (in million EUR)	207	115	55.5%	100.0%

Sources: Media Research Institute (Mediana Teve)

*Press, TV, Outdoor, Radio

Turkey’s acceptance as candidate for EU membership is a very positive step for the country and will not only means changes for the political stance but also for the media. Although the country is only on the waiting list at the moment and actual membership will occur in about a decade, it has already been accepted that things will have to change. Turkey has a fairly poor record when it comes to human rights and the EU will see to it that state censorship is abolished and freedom of speech allowed. It is a sad fact that broadcasters and political parties often work hand in hand, with both helping each other: The broadcasters bring positive coverage of the parties and in return enjoy little official regulation, or at least, there are less controls that regulations are being followed.

Ownership of television stations will also be scrutinised: at the moment, cross-ownership of television stations is forbidden and certain organisations such as trade unions, religious groups and local governments are not allowed to own stations. Under EU law, the situation will alter.

There are now 16 national broadcasters and approximately 250 local stations in Turkey. The latest station to open was BRT in March 1999. The main 4 networks are those of Show, Star, Kanal D and ATV. It looks as though the next few years may see various mergers between broadcasters as the fight for advertising revenues becomes ever stronger. Kanal D and ATV have already formed an alliance and it seems this may become a definite merger although nothing is official.

In 1999, the audience shares of the 4 main channels were fairly equal: Show and Kanal D both took a share of 15.6% whilst ATV lay a couple of points behind with 15.0%. Star had a somewhat lower share with 12.7%. Despite these seemingly high figures, all are less than the audience shares of 1998 by at least 2%.

At least 50% of Turkish programming must be of local production. Broadcasters get by this somewhat by producing local versions of foreign formats. One of these, “Who Wants to be a Millionaire ?” has been a huge hit in Turkey, as it has in many other European countries. The show is broadcast on the channel Show which has begun broadcasting far more programmes of foreign origin in the hope of attracting audiences with a higher income. Interestingly enough Kanal D and ATV have begun a completely different strategy by broadcasting more local productions in the hope of attracting viewers with a more average income.

Football is very popular in Turkey and the broadcaster who holds the right to the premier league is guaranteed good viewing figures. At the moment, these rights are held by the pay TV channel Cine 5, until 2001. The Kanal D-ATV alliance tried to get past this by privately signing a deal with two of the top clubs. This was, however, overruled by the courts and the channels will now have to wait until 2001 when the Cine 5 contract expires and

then go into battle for the “official rights”. Just by looking at the statistics for 1999, it is clear how popular football really is in Turkey: 8 of the top 10 programmes on all channels were football matches.

Due to Cine 5 holding the rights to broadcast football since 1998, cable subscriptions have greatly increased. According to figures released, subscriptions almost doubled between 1998 and 1999 from 675 000 to approximately 1 million. Cable laying has been upped in the major cities but as Turkey has many rural areas and in parts a certain degree of poverty, it is clear that complete cabling will not be possible.

Satellite television in Turkey is minimal. Those who have dishes are normally rich and the total percent of houses with a private dish amounts to only 4%. For Turks outside of Turkey there is to be a new satellite is planned called Turksat 2A which will provide Turkish programming to expatriates living in northern Russia and northern Europe. The planned launch date is late 2000.

The first digital broadcaster in Turkey is also broadcast by satellite. Digiturk, launched in March 1999 is also only received by a minority. The problem that cable and satellite broadcasters have is that there has never been a licence fee in Turkey and so viewers have never had to pay for any kind of viewing. Persuading the public that they should get either cable or satellite is no easy task. One plus point the broadcasters do have is that foreign programming is prohibited on terrestrial television. On terrestrial television channels, foreign films are always dubbed rather than having sub-titles. On cable and satellite, foreign language programming is allowed.

Television took the lion’s share of advertising in 1999. With 63.2% being spent in television, only the press could come anywhere near with 28.6%. The top 3 advertising categories were financial services, newspapers and marketing companies together making up 23.7% of the total TV advertising expenditure.

Turkey

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General Data

COUNTRY	
Land area (km ²)	774 815
Total population	63 000 000
Number of households	15 000 000
Average household size	4.2
In % of households equipped	
Phone	80.0
Mobile telephone subscribers	13.0
PC's	2.0
Internet access	1.0
Internet users*	1.2

ECONOMICS	
GDP in million USD (at current prices)	206 010
GDP per capita in USD (at current prices)	3 270
Inflation rate in 1999 (in %)	68.8
Value of TRL in Euro (EUR)**	1 EUR = 544.373 TRL
Value of TRL in US-Dollar (USD)**	1 USD = 541.880 TRL
Sources: Devlet İstatistik Enstitüt, TV International 2000	
*Individuals 5+ Data Collection Fessel-GfK Austria	
**December 1999	

TV OVERVIEW	
Total number of TV households (TVHH)	13 580 000
In % of all households	90.0
Numbers of channels received by 70% of the population	14
TV License-Fee cost per year	n.a.

TV EQUIPMENT	
	in % of TVHH
Colour TV	90.0
Multiset (homes with more than 1 TV set)	14.0
VCR	21.0
Teletext	22.0
Remote control	73.0

Sources: Devlet İstatistik Enstitüt

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	6.0
	connected	5.0
Satellite	private dish/DTH	4.0
	collective dish/SMATV	2.0
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	95.0

TV SUBSCRIPTION			
Analog pay TV subscribers	1%	Digital TV subscribers	n.a.

Source: Devlet İstatistik Enstitüt

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
TRT 1	1974	T, C, S	98%	Turkish	168	Generalist	L-F, Adv.	TRT
TRT 2	n.a.	T, C, S	85%	Turkish	n.a.	Generalist	L-F, Adv.	TRT
TRT 3	n.a.	T, C, S	81%	Turkish	n.a.	Sport	L-F, Adv.	TRT
TRT 4	n.a.	T, C, S	63%	Turkish	n.a.	Education	L-F, Adv.	TRT
TRT INT.	n.a.	T, C, S	20%	Turkish	n.a.	Generalist	L-F, Adv.	TRT

Sources: AGB Anadolu

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
ATV	1993	T, C, S	95%	Turkish	168	Generalist	Adv.	Bimas
KANAL D	1993	T, C, S	95%	Turkish	168	Generalist	Adv.	Bimas
SHOW TV	1992	T, C, S	95%	Turkish	168	Generalist	Adv.	Bimas
STAR	1990	T, C, S	95%	Turkish	168	Generalist	Adv.	Bimas
TGRT	1993	T, C, S	96%	Turkish	168	Generalist	Adv.	TGRT
HBB	1992	T, C, S	73%	Turkish	n.a.	Generalist	Adv.	HBB
KANAL 6	1993	T, C, S	73%	Turkish	n.a.	Generalist	Adv.	Kanal 6
KANAL 7	n.a.	T, C, S	77%	Turkish	n.a.	Generalist	Adv.	Kanal 7
SAMANYOLU	n.a.	T, C, S	83%	Turkish	n.a.	Generalist	Adv.	Samanyolu
NTV	n.a.	T, C, S	55%	Turkish	168	News	Adv.	NTV
FLASH	n.a.	T, C, S	49%	Turkish	n.a.	Generalist	Adv.	Flash
KRAL	1995	T, C, S	66%	Turkish	n.a.	Music	Adv.	PrimeMedya
NUMBER ONE	1995	T, C, S	20%	Turkish	n.a.	Music	Adv.	ElektroMedya
GENC	1996	T, C, S	45%	Turkish	n.a.	Music	Adv.	ElektroMedya
MESAJ	1995	T, C, S	47%	Turkish	n.a.	Religious	Adv.	Mesaj
DISCOVERY	1999	T, C, S	25%	Turkish	n.a.	Cultural	Adv.	ElektroMedya
KANAL E	1999	T, C, S	55%	Turkish	n.a.	Generalist	Adv.	NTV
CNN TURK	1999	T, C, S	60%	Turkish	168	News	Adv.	CNN TURK

Sources: AGB Anadolu

DOMESTIC CHANNELS (REGIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
EGE TV	1995	T, C, S	8%	Turkish	n.a.	Generalist	Adv.	Ege TV
OLAY TV	1994	T, C, S	8%	Turkish	n.a.	Generalist	Adv.	Olay

Sources: AGB Anadolu

INTERNATIONAL/PAN EUROPEAN CHANNELS							
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue	
BBC PRIME	Public	C	5%	English	Entertainment	Adv.	
CNN INT.	Private	C	5%	English	News	Adv.	
EUROSPORT	Private	C, S	7%	English	Sport	Adv.	
EURONEWS	Private	C, S	7%	English	News	Adv.	
TVE INT.	Public	C, S	5%	Spanish	Generalist	L–F, Spon.	
ARTE	Public	S	1%	French/German	Cultural	L–F, Spon.	
MTV EUROPE	Private	C, S	3%	English	Music	Adv.	
TV 5 EUROPE	Public	C, S	5%	French	Generalist	L–F, Spon.	

Source: AGB Anadolu

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
RAI 1	Public	S	1%	Italian	Generalist	L–F, Adv.
RTL	Private	C	5%	German	Generalist	Adv.

Source: AGB Anadolu

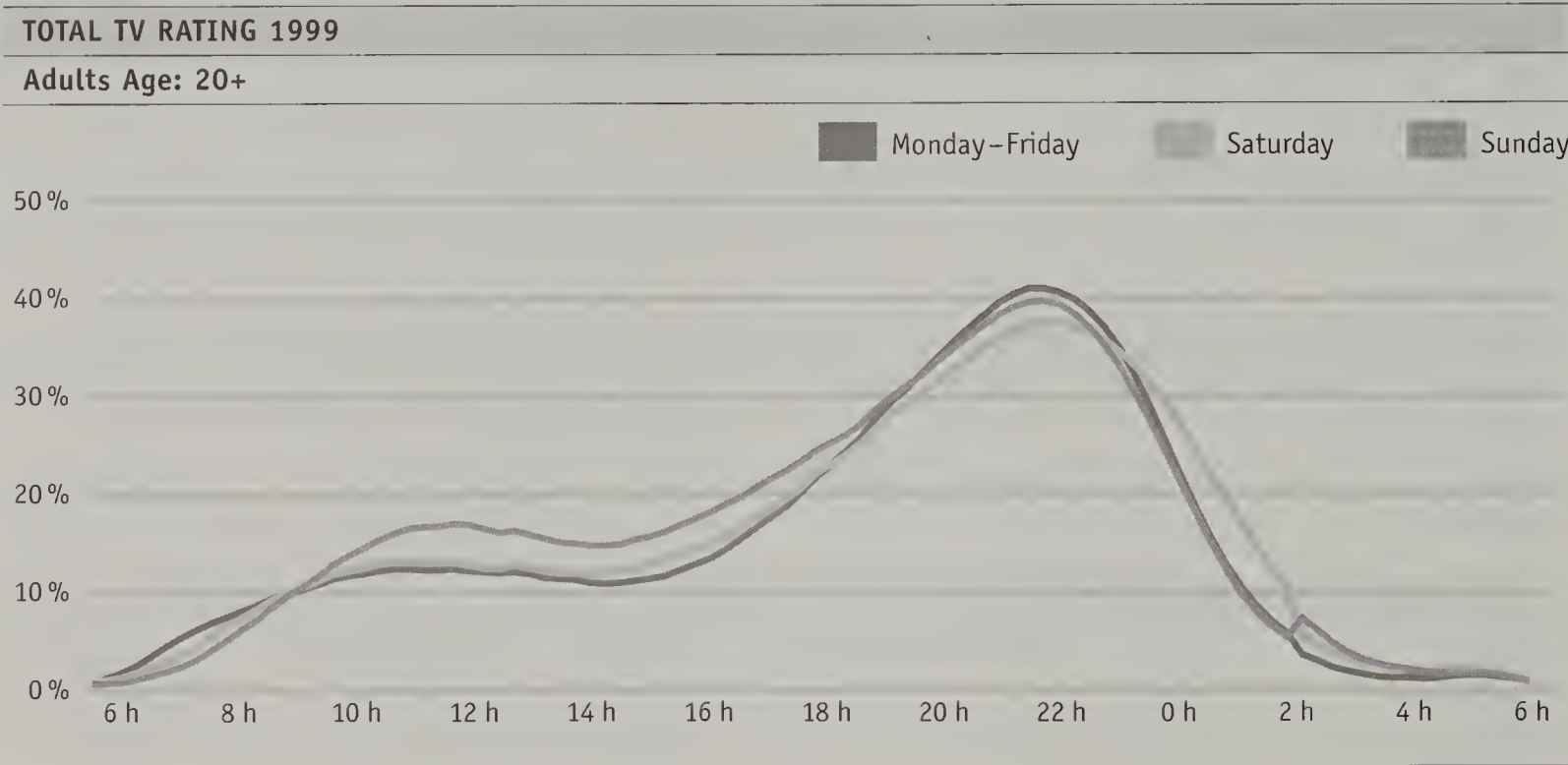
PAY TV (ANALOG)									
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue	Sales H.
CINE 5	1994	T, C, S	500 000	Turkish	n.a.	Movie, Sport	TRL 10000	Adv., Sub.	Mepas
TELEON	1999	T, C, S	50 000	Turkish	n.a.	Sport	TRL 30000	Adv., Sub.	Pri. Medya

Sources: AGB Anadolu

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	AGB Anadolu	
Panel/Sampling Size	1 630 households/6 853 individuals	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 5+	28 409	
Adults 20+	18 592	
Main Purchase Responsibles/House Keeper	7 341	
Young Adults 20–34	7 164	
Children 5–11	4 169	

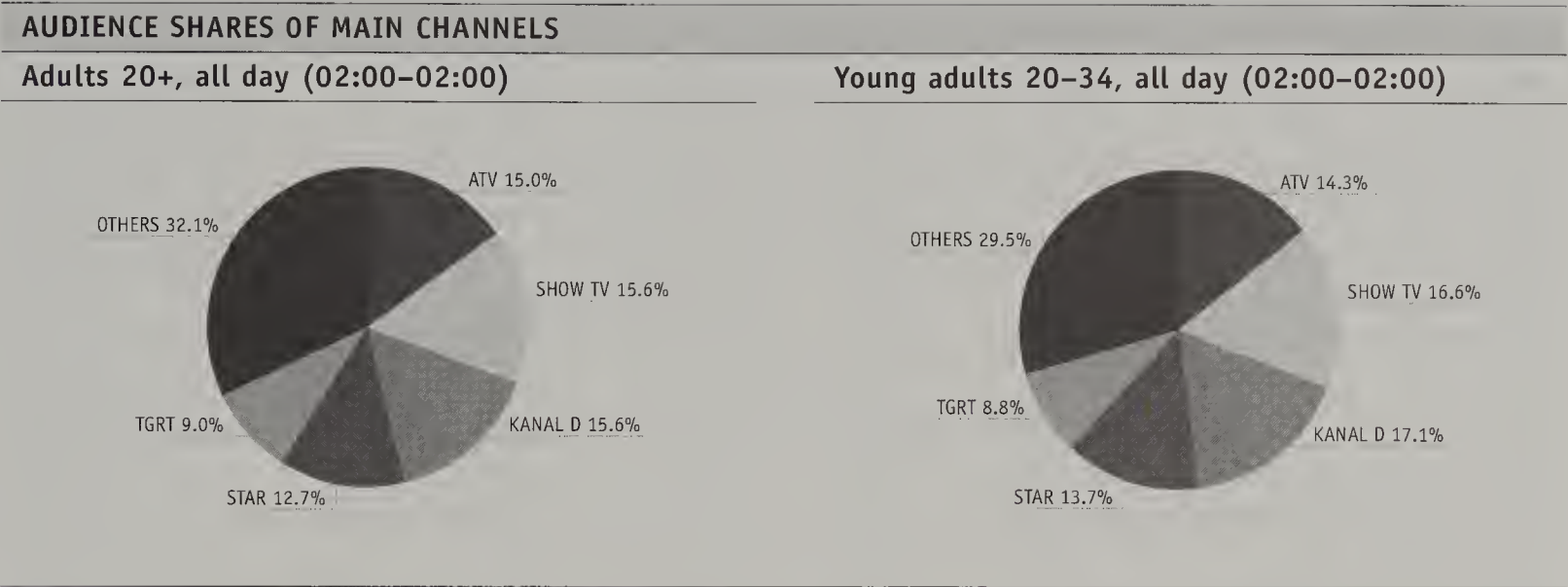
Sources: AGB Anadolu



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 20+			Children 5–11			Young Adults 20–34			Main Purchase Responsibles		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	n.a.	76.0	75.3	n.a.	75.9	75.0	n.a.	72.0	70.0	n.a.	82.0	80.6
Viewing time per Viewer	n.a.	319	n.a.	n.a.	n.a.	n.a.	n.a.	314	n.a.	n.a.	331	n.a.

Sources: AGB Anadolu

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00								
	Adults 20+		Young Adults 20–34		Children 5–11		Main Purchase Responsibles	
	1998	1999	1998	1999	1998	1999	1998	1999
ATV	18.2%	15.0%	17.2%	14.3%	15.1%	12.5%	18.6%	15.1%
SHOW TV	17.4%	15.6%	18.4%	16.6%	19.9%	19.0%	17.2%	15.4%
KANAL D	17.2%	15.6%	18.5%	17.1%	22.4%	22.4%	17.3%	15.5%
STAR	15.6%	12.7%	16.7%	13.7%	17.3%	15.1%	15.6%	12.4%
TGRT	5.2%	9.0%	4.6%	8.8%	3.6%	6.6%	5.1%	9.1%
OTHER	26.4%	32.1%	24.6%	29.5%	21.7%	24.4%	26.2%	32.5%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 20+		Young Adults 20–34		Children 5–11		Main Purchase Responsibles	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	7–19 h	19–23 h	7–19 h	19–23 h	7–19 h	19–23 h	7–19 h	19–23 h
ATV	14.5%	16.3%	14.1%	15.3%	11.8%	13.4%	14.7%	16.3%
SHOW TV	13.2%	18.2%	14.2%	19.2%	17.1%	22.2%	13.0%	18.0%
KANAL D	14.0%	17.5%	16.4%	18.2%	24.8%	20.1%	13.9%	17.6%
STAR	11.5%	13.7%	12.6%	14.8%	13.6%	17.0%	11.1%	13.6%
TGRT	8.9%	8.3%	8.3%	8.3%	5.6%	7.1%	9.0%	8.3%
OTHER	37.9%	26.0%	34.4%	24.2%	27.1%	20.2%	38.3%	26.2%

Source: AGB Anadolu

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
FBAL TURKEY-IRELAND		STAR	Sport	19:58	17/11	22.9%	49.9%.
FBAL GALATASARAY-MILAN		STAR	Sport	21:45	03/11	21.7%	50.5%
FBAL CHELSEA-GALATASARAY		STAR	Sport	21:45	28/09	20.6%	50.3%
FBAL GALATASARAY-CHELSEA		STAR	Sport	21:45	20/10	20.3%	46.9%
FBAL IRELAND-TURKEY		TRT1	Sport	21:02	13/11	20.2%	46.7%
YILAN HIKAYESI	Turkey	KANAL D	Series	21:41	23/12	20.2%	43.7%
FBAL MILAN-GALATASARAY		STAR	Sport	21:44	21/09	19.8%	49.7%
ARENA		KANAL D	Magazine	21:57	30/12	19.2%	43.2%
FBAL H.BERLIN-GALATASARAY		KANAL D	Sport	22:23	02/03	19.0%	43.8%
FBAL GALATASARAY-HERTA BERLIN		STAR	Sport	21:44	26/10	19.0%	44.0%
BAY TURNIKE		STAR	Game Show	21:45	15/09	18.7%	50.4%
FBAL BESIKTAS-GALATASARAY		ATV	Sport	20:07	29/01	18.0%	38.8%
BOYLE MI OLACAKTI		KANAL D	Series	19:59	05/05	17.8%	41.5%
FBAL TURKEY-MOLDAVIA		ATV	Sport	21:52	06/01	17.6%	37.6%
FBAL MOLDAVIA-Turkey		STAR	Sport	19:01	27/03	16.9%	40.3%
BABA EVI		STAR	Series	20:29	08/09	16.8%	42.5%
DELI YUREK	Turkey	ATV	Series	21:37	01/01	16.3%	35.0%
OLACAK O KADAR	Turkey	SHOW	Series	21:00	06/12	15.9%	34.8%
SANS KAPIYI CALINCA	Turkey	KANAL D	Series	21:42	17/12	15.4%	36.9%
BIZIMKILER	Turkey	SHOW	Series	20:59	04/03	15.0%	33.6%

Source: AGB Anadolu

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
JURASSIC PARK	USA	SHOW	20:52	10/10	14.2%	33.3%
TRAP	n.a.	SHOW	20:56	10/01	14.1%	33.4%
BANKER BILO	Turkey	SHOW	21:59	19/01	13.5%	32.7%
TRUE LIES	USA	SHOW	20:53	06/10	12.7%	31.5%
TOKATCI	Turkey	SHOW	20:45	27/02	12.4%	28.7%
FALSE FEED	n.a.	SHOW	22:40	04/03	12.2%	38.6%
FREEDOM WARRIORS	n.a.	STAR	22:18	14/03	12.1%	33.1%
INVITATION	n.a.	KANAL D	22:28	14/01	12.0%	40.5%
TARZAN RIFKI	Turkey	SHOW	20:39	20/02	11.9%	24.6%
SUT KARDESLER	Turkey	SHOW	20:44	30/03	11.9%	32.3%

Source: AGB Anadolu

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL TURKEY-IRELAND		STAR	19:58	17/11	22.9%	49.9%
FBAL GALATASARAY-MILAN		STAR	21:45	03/11	21.7%	50.5%
FBAL CHELSEA-GALATASARAY		STAR	21:45	28/09	20.6%	50.3%
FBAL GALATASARAY-CHELSEA		STAR	21:45	20/10	20.3%	46.9%
FBAL IRELAND-TURKEY		TRT 1	21:02	13/11	20.2%	46.7%
FBAL MILAN-GALATASARAY		STAR	21:44	21/09	19.8%	49.7%
FBAL H.BERLIN-GALATASARAY		STAR	21:44	26/10	19.0%	44.0%
FBAL GALATASARAY-HERTA BERLIN		STAR	21:45	15/09	18.7%	50.4%
FBAL BESIKTAS-GALATASARAY		KANAL D	19:59	05/05	17.8%	41.5%
FBAL TURKEY-MOLDAVIA		STAR	19:01	27/03	16.9%	40.3%

Source: AGB Anadolu

Top Programmes Channel by Channel

STAR						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
AYNALI TAHIR	Turkey	Series	39	20:43	8.8%	20.8%
UVEY BABA	Turkey	Series	39	20:44	8.2%	18.6%
TELE GOL (PAZAR)	Turkey	Sport	9	20:50	8.1%	18.5%
SEN ALLAH'IN BIR LUTFUSUN	Turkey	Series	15	21:59	7.3%	17.3%
OBJEKTIF	Turkey	Magazine	4	21:57	7.3%	18.2%
KARA MELEK	Turkey	Series	36	20:58	7.1%	16.5%
YASEMINCE	Turkey	Series	8	20:25	7.1%	15.7%
BIR DEMET TIYATRO	Turkey	Series	41	20:54	6.9%	16.5%
KELOGLAN	Turkey	Series	5	21:43	6.7%	15.4%
BIZIMKILER	Turkey	Series	65	19:02	6.4%	16.5%

Top 10 Single Programmes	Genre	Date	Start.Time	Audience	Share
FBAL TURKEY-IRELAND	Sport	17/11	19:58	22.9%	49.9%
FBAL GALATASARAY-MILAN	Sport	03/11	21:45	21.7%	50.5%
FBAL CHELSEA-GALATASARAY	Sport	28/09	21:45	20.6%	50.3%
FBAL GALATASARAY-CHELSEA	Sport	20/10	21:45	20.3%	46.9%
FBAL MILAN-GALATASARAY	Sport	21/09	21:44	19.8%	49.7%
FBAL H.BERLIN-GALATASARAY	Sport	26/10	21:44	19.0%	44.0%
FBAL GALATASARAY-BERLIN	Sport	15/09	21:45	18.7%	50.4%
FBAL TURKEY-MOLDAVIA	Sport	27/03	19:01	16.9%	40.3%
FBAL MOLDAVIA-TURKEY	Sport	08/09	20:29	16.8%	42.5%
FBAL TURKEY-POLAND	Sport	16/11	20:03	11.9%	26.6%

Source: AGB Anadolu

SHOW						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
BIZIMKILER	Turkey	Series	7	20:45	11.4%	25.5%
DELI YUREK	Turkey	Series	36	21:09	10.3%	23.1%
KUCUK IBO	Turkey	Series	13	20:56	9.3%	21.2%
SIRILSIKLAM	Turkey	Series	19	20:55	9.2%	20.2%
MARATON (PAZAR)	Turkey	Sport	20	20:58	8.9%	21.1%
HABABAM SINIFI	Turkey	Series	4	21:14	8.7%	21.2%
FILM GIBI	Turkey	Series	29	21:30	8.6%	22.3%
SANS KAPIYI CALINCA	Turkey	Series	38	21:25	8.4%	20.1%
HABABAM SINIFI TATILDE	Turkey	Series	4	21:09	8.4%	18.0%
MARATON (KUPA)	Turkey	Sport	6	21:41	8.4%	18.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
JURASSIC PARK	USA	Movie	10/10	20:52	14.2%	33.3%
TRAP	n.a.	Movie	10/01	20:56	14.1%	33.4%
TRUE LIES	USA	Movie	06/10	20:53	12.7%	31.5%
TOKATCI	Turkey	Movie	27/02	20:45	12.4%	28.7%
DAVID COPPERFIELD	n.a.	Show	07/11	20:55	12.2%	29.3%
TARZAN RIFKI	Turkey	Movie	20/02	20:39	11.9%	24.6%
DELI DELI KUPELI	Turkey	Movie	30/01	21:30	11.2%	24.4%
BANKER BILO	Turkey	Movie	19/01	21:24	11.1%	26.0%
HOME ALONE 2	USA	Movie	25/12	20:42	10.8%	26.3%
MECHUL KADIN	Turkey	Movie	13/02	17:43	10.8%	30.0%

Source: AGB Anadolu

KANAL D						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
YILAN HIKAYESI	Turkey	Series	13	22:01	15.7%	37.3%
ARENA	Turkey	Magazine	25	22:08	11.6%	28.1%
OLACAK O KADAR	Turkey	Series	14	21:36	11.0%	26.7%
CARKIFELEK	Turkey	Series	155	20:34	9.6%	21.7%
SAHANE PAZAR	Turkey	Series	34	20:57	7.6%	18.5%
TELEVOLE	Turkey	Series	50	21:51	7.5%	20.6%
EYVAH BABAM	Turkey	Series	25	21:25	6.9%	16.9%
RUHSAR	Turkey	Series	44	20:27	6.7%	18.5%
SANS DIREKSIYONU	Turkey	Series	4	20:35	6.3%	16.9%
HIGH LIFE	Turkey	Magazine	40	22:54	6.1%	21.1%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
FBAL BESIKTAS-GALATASARAY		Sport	05/05	19:59	17.8%	41.5%
OLACAK O KADAR(OZEL)	Turkey	Series-Special	31/12	21:50	14.0%	31.1%
INVITATION	n.a.	Movie	14/01	22:28	12.0%	40.5%
FBAL BESIKTAS-H.HAIFA		Sport	28/07	20:46	11.6%	38.7%
THE SPECIALIST	USA	Movie	13/12	21:32	10.8%	25.0%
FBAL GALATASARAY-FEYENOORD		Sport	20/01	20:05	10.6%	27.0%
TARTISMA ARENASI	Turkey	Variety Show	25/02	23:01	10.6%	32.2%
FBAL BESIKTAS-KOCAELISPOR		Sport	02/02	20:01	10.4%	21.7%
FBAL GALATASARAY-B.DORTMUND		Sport	18/01	20:34	10.3%	23.9%
RICHIE RICH	USA	Movie	04/12	21:38	10.0%	24.4%

Source: AGB Anadolu

ATV						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
BABA EVI	Turkey	Series	40	21:15	11.1%	26.6%
MAHALLENIN MUHTARLARI	Turkey	Series	33	21:10	10.7%	25.6%
BOYLE MI OLACAKTI	Turkey	Series	34	21:07	9.0%	22.2%
BAY TURNIKE	Turkey	Series	97	21:01	9.0%	21.0%
IKINCI BAHAR	Turkey	Series	13	20:37	8.7%	20.2%
IBO SHOW	Turkey	Series	17	20:26	8.7%	22.1%
CICEK TAKSI	Turkey	Series	75	17:48	7.5%	24.8%
TATLI KACIKLAR	Turkey	Series	53	21:01	7.4%	19.5%
SICAK SAATLER	Turkey	Series	15	21:28	7.0%	17.1%
AFFET BIZI HOCAM	Turkey	Series	18	20:51	6.8%	15.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
FBAL FENERBAHCE-REAL MADRID		Sport	02/08	22:03	13.7%	45.4%
FBAL BESIKTAS-ANKARAGUCU		Sport	11/03	20:01	11.0%	23.5%
FBAL FENERBAHCE-B.DORTMUND		Sport	24/01	17:04	10.6%	27.1%
GUNAYDIN ISTANBUL KARDES (T.S)	Turkey	Movie	01/12	22:11	10.0%	26.4%
AFRICAN'S TIGER	Turkey	Movie	06/12	20:38	9.8%	22.1%
CANLI HAYAT (T.S)	Turkey	Movie	24/01	21:28	9.6%	21.8%
BLACK EAGLE	USA	Movie	04/02	22:30	8.8%	22.7%
LAWNESS	USA	Movie	28/01	22:47	8.3%	22.5%
ZUBUK (T.S)	Turkey	Movie	17/01	21:08	8.2%	19.1%
FBAL PANATHINAIKOS-BESIKTAS		Sport	12/10	21:22	8.1%	19.6%

Source: AGB Anadolu

Advertising Expenditure

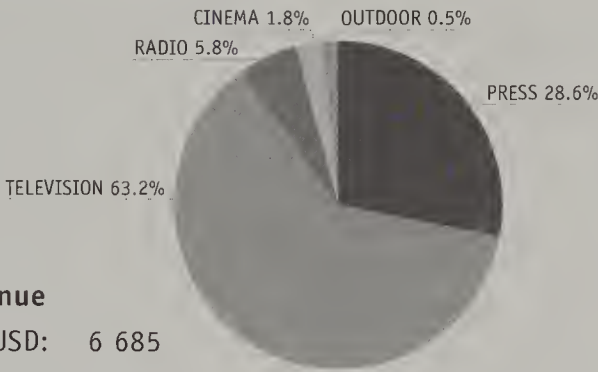
ADVERTISING FIGURES	GROSS	NET*
Total adspend (in million USD)	6 685	884
Total adspend (in million EUR)	6 763	880
TV adspend (in million USD)	4 226	342
TV adspend (in million EUR)	4 274	340
TV adspend in % of GDP	n.a.	0.17
TV adspend per capita (USD)	67.1	5.4

*TV International 2000

TV ADVERTISING STATISTICS	
Total number of spots broadcast	1 220 201
Average spot length (in sec.)	28.6
Total number of advertisers	n.a.
Number of TV advertisers	812
Total number of advertised products	n.a.
Number products advertised on TV	2 095

Sources: Bilesim, Deniz Reklam, Fida Film

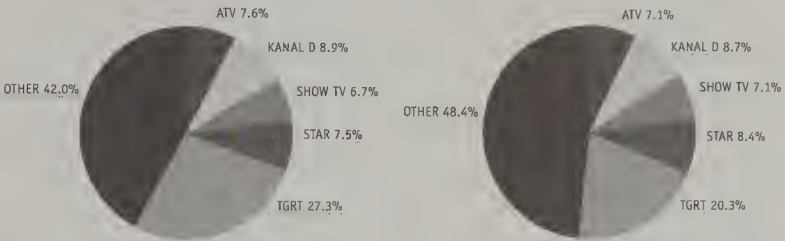
SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue
in million USD: 6 685
in million EUR: 6 763

Sources: Bilesim, TV International 2000

SHARE OF TV ADVERTISING REVENUE	GROSS/NET
Channels: Advertising Market Share in %	



Total TV Revenue (Gross)	Total TV Revenue (Net)
in million USD: 4 226	in million USD: 343.9
in million EUR: 4 274	in million EUR: 342.3

TOP 10 ADVERTISING FIGURES GROSS				
TV Advertising Sectors	2 Media*	Television	Spent in TV	Share of TV Expenditure
FINANCIAL (BANK)	515.2	356.4	69.2%	8.4%
NEWSPAPERS	346.4	335.3	96.8%	7.9%
MARKETING COMPANIES	388.1	311.8	80.3%	7.4%
DETERGENT	285.6	284.9	99.8%	6.7%
SHAMPOO	183.5	179.4	97.8%	4.2%
SURFACE CLEANERS	150.4	149.7	99.5%	3.5%
TELEPHONE	241.4	147.1	60.9%	3.5%
NON-ALCOHOLIC DRINKS	130.0	126.7	97.5%	3.0%
DIAPERS/WOMEN'S HYGENE	115.6	113.7	98.4%	2.7%
DISH WASHING PRODUCTS	82.8	82.1	99.2%	1.9%
OTHERS	3 698.0	2 138.4	94.6%	50.6%
TV Advertisers				
SAMANYOLU TV	112.6	112.0	99.5%	2.7%
EGEBANK	137.8	88.0	63.9%	2.1%
CALGON	68.2	68.2	100.0%	1.6%
KOSLA	62.8	62.8	100.0%	1.5%
ISTIKBAL	70.8	54.7	77.3%	1.3%
INTER LINK	47.9	47.9	100.0%	1.1%
QUANTO	47.4	47.4	100.0%	1.1%
STAR NEWSPAPER	45.0	44.1	98.0%	1.0%
SABAH NEWSPAPER	43.9	43.0	98.0%	1.0%
CALGONIT	42.9	42.9	100.0%	1.0%
OTHER	5 457.7	3 614.5	66.2%	85.5%
Total (in million USD)	6 137	4 226	68.9%	100.0%
Total (in million EUR)	6 208	4 275	68.9%	100.0%

Source: Bilesim

*TV, PRINT

Economical crises in August of 1998 made the situation on the television market rather critical. Nobody anticipated the damage the Russian crisis would cause. Advertisers almost en mass trimmed their sails by cutting back in all directions, with particularly the big TV spenders putting all activity on hold. Some advertising support companies lost their shirts as the financial crisis in Russia overflowed to the Baltic states and certain banks collapsed. To limit spending, wise marketers keep high trade mark awareness and knowledge through promotions or sponsorships which at the very least allow the consumer to be reminded of a presence.

The TV broadcasting industry is a dynamic and active industry in Ukraine. However, there are obstacles to foreign investments in this industry. By law, foreign shares in a company that broadcasts in Ukraine cannot exceed 30 percent. Foreign companies or foreign citizens cannot independently establish a TV or radio broadcasting company in Ukraine. Ukrainian legislation also includes provisions that are aimed at monopolization in the TV and radio broadcasting industry.

Cable TV in Ukraine began long before Ukrainian independence as Kyiv's hilly topography prevented some government entities „downtown“ from receiving quality signals from the city TV tower. Depending on the company, customers receive from 10–30 channels. This number usually includes 10 Ukrainian channels, 4–7 Russian channels and some international channels. The authorities also established a limit for monthly user fees at UAH 2.8 (US\$1.50 at that time). Another regulation stipulates that foreign programming transmitted by the operator must be accompanied by Ukrainian translation. This guideline, though ignored by most of the operators, if implemented, would stimulate operating companies to limit the number of foreign channels (except for Russian channels).

Because of the payment system in Ukraine, TV advertising is the only business activity that generates revenues for TV broadcasting companies. Therefore, the statistics of TV advertising may be used to assess the size of the market and its development.

By law, no less than 50 percent of programming must be of Ukrainian origin. The programming product most requested by TV audience in Ukraine is TV serials. Major TV advertising promotes consumer goods, and TV serials watched by female audiences offer the perfect opportunity for the advertising of these products. News and sports could be rated as second by the numbers they attract. However, the National TV Broadcasting Company of Ukraine has a monopoly on broadcasting international sport events in Ukraine. Commercial channels can purchase the right to retransmit any special event but only from the National TV Broadcasting Company. There are a number of programming products produced by major local studios and sold to TV broadcasters. Some of them are quite popular and offer good possibilities for advertising. Good and popular movies, especially U.S. productions, improve channel ratings and attract more TV advertising.

The Ukrainian audience is very receptive to political news, especially news related to Russia and other NIS countries. This interest is higher among older people and decreases with youngsters who have no direct ties with the Soviet social and cultural heritage. Young people are much more receptive to Western values than older people who are more affected by hardships arising from the state of the national economy. TV serials of U.S. and Latin American production compete in their popularity and even surpass newscasts among female audiences and people of advanced age. Older people are usually more dedicated to the programming products inherited from the former Soviet television.

It should also be noted that since most Ukrainian families only have one TV set, family channels hold the attention of the audience better. This is especially important for large cities with cable TV and less relevant for small towns and villages where the choices are limited.

The television audience measurement in Ukraine is based on the AGB system. The AGB Ukraine sample represents population aged 4 years in 25 regional centres of Ukraine and Kyiv. In 1998, the peplemeters were installed in 603 Ukrainian households. At the end of 1999, there were 845 peplemeters in 25 regions of Ukraine (2553 respondents).

There was a 16% decrease in advertising expenditure in 1999 compared with 1998, though starting from week 27–28 turnover reached the same level. Only those sectors which were less exposed to the crisis or are still relevant for the consumer remain active. The appearance of teleshops on the air was news last year, as were various interactive contests. Together with the promotion of different cultural events, these three occurrences became the peculiarity of last year. This fact meant that the real situation with advertising expenditure was not so clear cut. The agreed budget rolled off for several weeks following the crisis and later turnover noticeably dropped as well as CPP. The decrease in the market lasted until the end of March 1999. By April, CPP reached the 1998 rate, as weekly expenditure came up to that of 1998. The data shows that clients who had pondered over the question to buy airtime or not dared to spend additional money by the end of the year.

Ukraine

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General Data

COUNTRY	
Land area (km ²)	603 700
Total population	50 245 208
Number of households	18 609 336
Average household size	2.7
In % of households equipped*	
Phone	61.9
Mobile telephone subscribers	0.5
PC's	3.2
Internet access	n.a.
Internet users	2.5

Source: MMI Ukraine *data for urban population 16+ (pop: 27 062 822)

ECONOMICS	
GDP in million UAH (at current prices)	127 126
GDP per capita in UAH (at current prices)	2 530
Inflation rate in 1999 (in %)	19.2
Value of UAH in Euro (EUR)	1 EUR = 5.08 UAH ¹
Value of UAH in US-Dollar (USD)	1 USD = 4.13 UAH ¹

Sources: National Bank of Ukraine, Ukraine's Ministry of Statistic ¹average rate in 1999

TV OVERVIEW	
Total number of TV households (TVHH)	18 317 889
In % of all households	83.0
Numbers of channels received by 70% of the population	3
TV License-Fee cost per year	none

TV EQUIPMENT*	
	in % of TVHH
Colour TV	79.2
Multiset (homes with more than 1 TV set)	27.8
VCR	14.2
Teletext	n.a.
Remote control	32.1

Source: MMI Ukraine, September 1999 *data for urban popul. 16+ (pop: 27 062 822)

TV DISTRIBUTION**		
		in % of TVHH
Cable	passed	n.a.
	connected	17.9
Satellite	private dish/DTH	3.9
	collective dish/SMATV	4.5
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

**data for 1998

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
UT-1	1951	T, C	91.9%	Ukrainian	90	Generalist	Adv., Gvt.	Nat. TV comp.
UT-2	1993	T, C	91.1%	Ukrainian	40	Generalist	Adv., Gvt.	Nat. TV comp.

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue	Sales House
ICTV	1992	T, C	41.0%	Ukrainian	130	Generalist	Adv.	ICTV
STUDIO 1+1	1995	T, C	91.1%	Ukrainian	90	Generalist	Adv.	Prioritet
INTER	1996	T, C	90.1%	Russ./Ukrain.	100	Generalist	Adv.	Inter-Reklama
STV	1997	T, C, S	27.9%	Ukrainian	120	Generalist	Adv.	STV
ERA	1999	T, C	91.9%	Ukrainian	30	Generalist	Adv.	Razborn-TV

Source: Studio 1+1 TV

INTERNATIONAL/PAN EUROPEAN CHANNELS							
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Sales House	
EUROSPORT	Private	C, S	n.a.	English/German	Sport	Adv.	
TV 5 EUROPE	Public	C, S	n.a.	French	Generalist	L-F, Spon.	
TVE INT.	Public	C, S	n.a.	Spanish	Generalist	L-F, Spon.	
DEUTSCHE WELLE	Public	C, S	n.a.	English/German	News	L-F	
CNBC EUROPE	Private	C, S	n.a.	English	Economy	Adv.	
EURONEWS	Private	C, S	n.a.	English/German	News	Adv.	
TNT/CARTOON NETWORK	Private	C, S	n.a.	English	Old Movies/Cartoons	Adv.	

OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
TV POLONIA	Public	C, S	n.a.	Polish	Generalist	L-F, Adv.
POLSAT	Private	C, S	n.a.	Polish	Generalist	Adv.
POLSAT 2	Private	C, S	n.a.	Polish	Generalist	Adv.
ORT	Public	C, S	n.a.	Russian	Generalist	L-F, Adv.
RTR	Public	C, S	n.a.	Russian	Generalist	L-F, Adv.
NTV	Private	C, S	n.a.	Russian	Generalist	Adv.
VIVA 2	Private	C, S	n.a.	German	Music	Adv.
ZDF	Public	C, S	n.a.	German	Generalist	L-F, Adv.
TV CENTRE	Private	C, S	n.a.	Russian	Generalist	Adv.
REN TV	Private	C, S	n.a.	Russian	Generalist	Adv.
TV 6 MOSKOW	Private	C, S	n.a.	Russian	Generalist	Adv.
RTL-7	Private	C, S	n.a.	Polish	Generalist	Adv.
TNT	Private	C, S	n.a.	Russian	Entertainment	Adv.

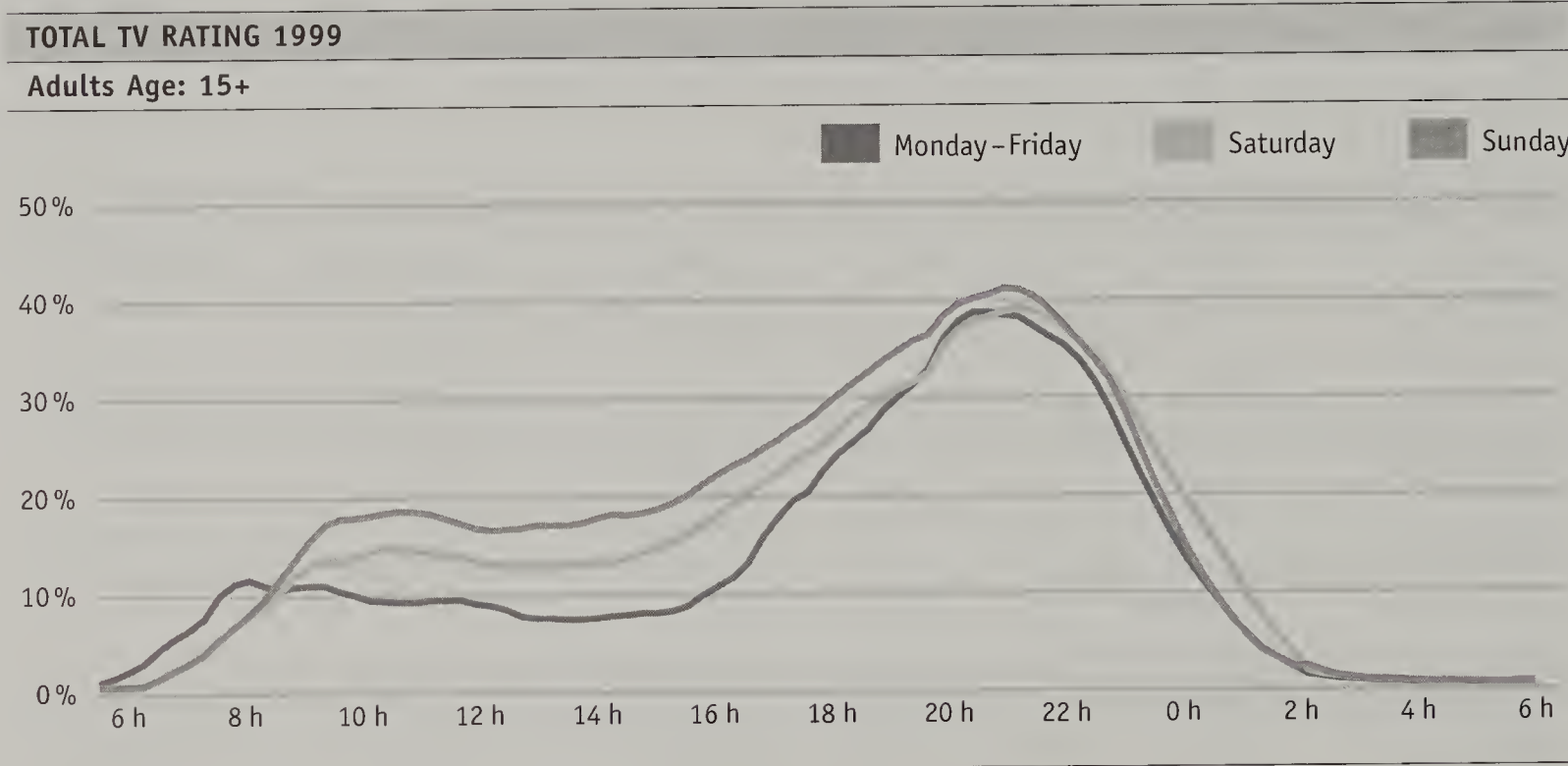
PAY TV (ANALOG)							
Channels	Diffusion	Subscr.	Language	h/week	Programming	Cost/month	Revenue
IVK	C	n.a.	Ukrainian/Russian	100	Movies	Sub., Adv.	IVK
Kupol	C	n.a.	Ukrainian/Russian	100	Movies	Sub., Adv.	Kupol

Source: Studio 1+1 TV

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	AGB Ukraine	
Panel/Sampling Size	853 households in 25 regional centers	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	47 803	
Adults 15+	40 602	
Young Adults 15–44	21 750	
Children 4–14	7 201	

Sources: AGB Ukraine

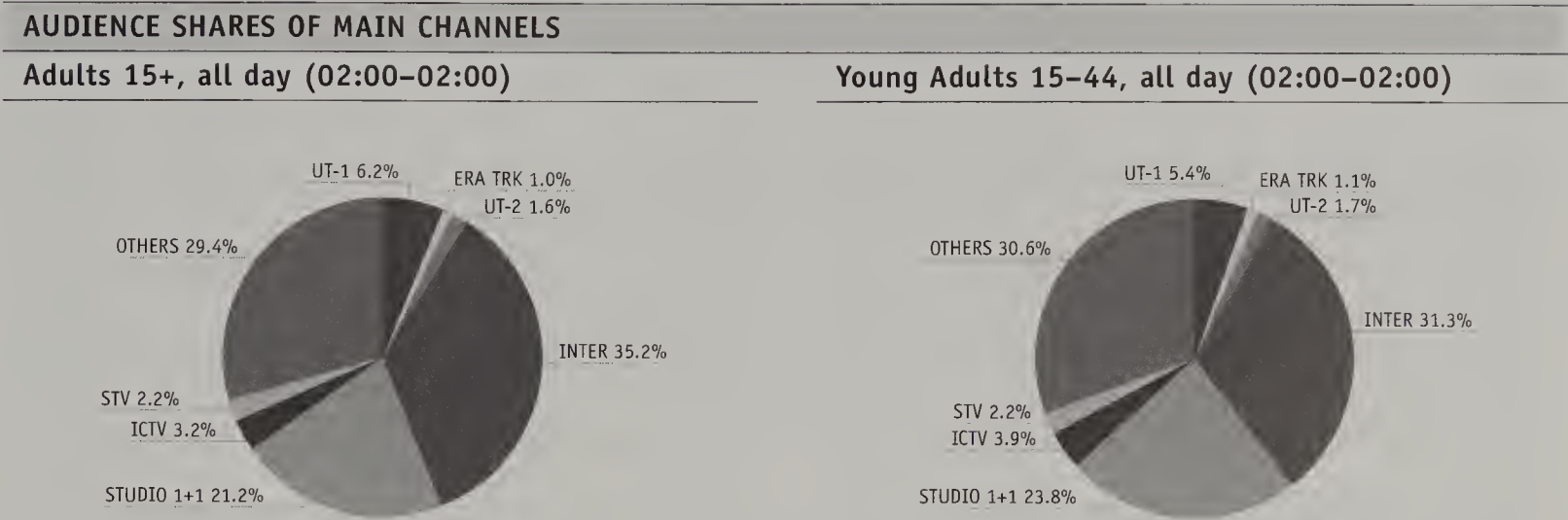


DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 15+			Children 4–14			Young Adults 15–44			Main Purchase Responsibles		
	1997	1998*	1999	1997	1998*	1999	1997	1998*	1999	1997	1998*	1999
Daily reach in %	n.a.	72.0	70.3	n.a.	66.5	71.0	n.a.	68.4	76.0	n.a.	76.0	75.6
Viewing time per Viewer	n.a.	268	273	n.a.	n.a.	238	n.a.	266	265	n.a.	270	281
Viewing time per Individual	n.a.	197	193	n.a.	n.a.	161	n.a.	192	182	n.a.	208	214

Source: AGB Ukraine, Studio 1+1 research department

*data for 1998 is based on a different pannel

Audience Shares



Source: AGB Ukraine

AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00										
	Adults 15+		Young Adults 15–44		Children 4–14		Main Purchase Responsibles		Housewives	
	1998*	1999	1998*	1999	1998	1999	1998*	1999	1998*	1999
UT -1	9.1%	6.2%	8.5%	5.4%	n.a.	4.6%	9.2%	6.2%	10.4%	6.6%
ERA TRK	n.a.	1.0%	n.a.	1.1%	n.a.	0.6%	n.a.	1.0%	n.a.	1.2%
UT -2	n.a.	1.6%	n.a.	1.7%	n.a.	1.6%	n.a.	1.6%	n.a.	1.9%
INTER	28.6%	35.2%	25.9%	31.3%	n.a.	27.2%	30.5%	37.5%	31.0%	31.9%
STUDIO 1+1	21.8%	21.2%	23.4%	23.8%	n.a.	27.5%	22.0%	20.7%	22.5%	21.9%
ICTV	4.2%	3.2%	5.2%	3.9%	n.a.	6.9%	3.5%	2.8%	4.0%	3.2%
STV	2.3%	2.2%	2.5%	2.2%	n.a.	1.8%	2.3%	2.1%	2.0%	2.4%
OTHERS	34.0%	29.4%	34.5%	30.6%	n.a.	29.8%	32.5%	28.1%	30.1%	30.9%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS										
	Adults 15+		Young Adults 15–44		Children 4–14		Main Purchase Responsibles		Housewives	
	D.-Time	Pr.-Time	D.-Time	Pr.-Time	D.-Time	Pr.-Time	D.-Time	Pr.-Time	D.-Time	Pr.-Time
	6–19 h	19–23 h	6–19 h	19–23 h	6–19 h	19–23 h	6–19 h	19–23 h	6–19 h	19–23 h
UT -1	6.0%	6.3%	5.2%	5.3%	4.8%	4.0%	6.0%	6.3%	6.7%	6.4%
ERA	1.2%	0.1%	1.2%	0.1%	0.6%	0.0%	1.4%	0.1%	1.3%	0.1%
UT -2	3.5%	0.0%	3.6%	0.0%	2.8%	0.0%	3.5%	0.0%	3.9%	0.0%
INTER	28.8%	42.6%	26.6%	36.6%	23.8%	32.1%	31.4%	44.4%	28.0%	36.9%
STUDIO 1+1	17.8%	25.1%	19.5%	29.8%	22.3%	35.5%	17.2%	24.3%	18.1%	26.9%
ICTV	4.2%	2.5%	5.1%	3.0%	9.0%	4.5%	3.5%	2.3%	4.5%	2.2%
STV	2.0%	2.0%	2.1%	2.0%	1.9%	1.5%	1.9%	2.0%	2.1%	2.2%
OTHERS	36.5%	21.4%	36.7%	23.2%	34.8%	22.4%	35.1%	20.6%	35.4%	25.3%

Source: AGB Ukraine

*data for 1998 is based on a different pannel

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
TIME	Russia	Inter	News	20:25	16/09	25.0%	64.8%
STREETS OF BROKEN LAMPS	Russia	Inter	Series	21:05	20/03	24.3%	58.2%
FEATURES OF NATIONAL FISHING	Russia	Inter	Movie	20:42	01/01	24.3%	51.0%
FIFTH ELEMENT	USA	Studio 1+1	Movie	20:16	03/01	24.0%	46.9%
WHEEL OF FORTUNE	Russia	Inter	Game Show	19:03	19/03	23.9%	62.2%
PAST	Ukraine	Inter	Magazine	20:52	02/12	23.7%	54.8%
SHOWDOWN IN LITTLE TOKYO	USA	Studio 1+1	Movie	19:41	28/02	23.7%	49.2%
KHRESCHATYK THE CORNER*	Ukraine	Inter	Comedy Show	17:56	09/01	23.3%	55.4%
BROTHER	USA	Inter	Movie	21:06	18/03	23.0%	55.6%
COLUMBO/A TRACE OF MURDER	USA	Inter	Series	21:33	07/02	23.0%	55.4%
HARD TARGET	USA	Inter	Movie	21:21	08/11	22.4%	57.1%
NATALI JOINS HEARTS/CONCERT	Ukraine	Inter	Music	18:39	08/03	22.4%	55.6%
GENTLEMAN SHOW	Ukraine	Inter	Comedy Show	21:03	14/02	22.4%	50.8%
SONG OF THE YEAR 1998/FINALE	Russia	Inter	Music	18:35	02/01	22.4%	45.1%
DETAILS	Ukraine	Inter	News	20:00	08/10	22.3%	56.7%
COLUMBO/MURDER BY THE BOOK	USA	Inter	Movie	21:01	19/02	21.9%	49.1%
RUNAWAY CAR	USA	Inter	Movie	21:24	21/03	21.7%	54.1%
SINGING IN BLACKTHORN	UK	Inter	Series	19:09	26/01	21.6%	59.3%
LOHOVSKIY'S BUSINESS	Russia	Inter	Movie	21:29	25/12	21.6%	52.8%
MONDAY'S CHILDREN	Russia	Inter	Movie	21:23	08/01	21.6%	51.7%
* OF DEREASSOVSKA							

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
FEATURES OF NATIONAL FISHING	Russia	Inter	20:42	01/01	24.3%	51.0%
FIFTH ELEMENT	USA	Studio 1+1	20:16	03/01	24.0%	46.9%
SHOWDOWN IN LITTLE TOKYO	USA	Studio 1+1	19:41	28/02	23.7%	49.2%
BROTHER	USA	Inter	21:06	18/03	23.0%	55.6%
HARD TARGET	USA	Inter	21:21	08/11	22.4%	57.1%
COLUMBO/MURDER BY THE BOOK	USA	Inter	21:01	19/02	21.9%	49.1%
RUNAWAY CAR	USA	Inter	21:24	21/03	21.7%	54.1%
LOHOVSKIY'S BUSINESS	Russian	Inter	21:29	25/12	21.6%	52.8%
MONDAY'S CHILDREN	Russia	Inter	21:23	08/01	21.6%	51.7%
SHADOW OF A STRANGER	USA	Inter	21:03	29/01	21.6%	50.2%

TOP 10 SPORT EVENTS						
Title	Channel	Start. Time	Date	Audience	Share	
FBAL CL BAYERN MUNICH– DINAMO KYIV	UT-1	21:35	21/04	20.2%	51.3%	
FBAL CL DINAMO KYIV–BAYERN MUNICH	UT-1	21:35	07/04	19.4%	52.4%	
FBAL CL DINAMO KYIV–REAL MADRID	UT-1	21:35	17/03	18.4%	48.0%	
BOXING VITALIY KLICHKO–OBED SALLIVAN	Studio 1+1	0:09	11/12	17.4%	72.6%	
FBAL CL DINAMO KYIV–LAZIO ITALY	UT-1	21:35	02/11	17.0%	49.9%	
FBAL SLOVENIA–UKRAINE	Inter	19:55	13/11	16.6%	39.0%	
FBAL CL REAL MADRID–DINAMO KYIV	UT-1	21:35	03/03	15.8%	42.6%	
FBAL CL DINAMO KYIV–REAL MADRID	UT-1	21:33	24/11	14.3%	42.5%	
FBAL CL BAYERN MUNICH–DINAMO KYIV	UT-1	21:35	07/12	14.1%	41.3%	
FBAL EU CUP FRANCE–UKRAINE	UT-1	21:41	27/03	14.0%	36.7%	

Sources: AGB Ukraine

Top Programmes Channel by Channel

STUDIO 1+1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
SCARLET	USA	Series	4	17:59	86	14.1%	45.5%
SV-2000	Ukraine	Comedy Show	4	21:44	28	12.1%	29.7%
KVN	Russia	Game Show	4	18:01	96	11.4%	35.0%
NEW ADVENTURES OF SUPERMAN	USA	Series	12	18:26	44	11.1%	31.5%
BEVERLY HILLS	USA	Series	157	17:07	42	10.2%	50.6%
COMTE DE MONTE CRISTO	France	Movie	9	22:16	54	10.1%	34.3%
KVN. OPEN UKRAINIAN LEAGUE	Ukraine	Game Show	4	17:59	84	9.9%	38.2%
ALL JVANETSKIY	Ukraine	Comedy Show	15	21:48	27	9.8%	23.5%
ADVENTURER	USA	Series	21	19:45	44	9.7%	26.4%
X-FILES	USA	Series	31	22:15	42	9.4%	30.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FIFTH ELEMENT	USA	Movie	03/01	20:16	118	24.0%	46.9%
SHOWDOWN IN LITTLE TOKYO	USA	Movie	28/02	19:41	73	23.7%	49.2%
POLICE ACADEMY 5	USA	Movie	03/12	20:15	84	19.7%	44.6%
POLICE ACADEMY 4	USA	Movie	26/11	20:12	79	18.7%	40.9%
BIG TROUBLE IN A LITTLE CHINA	USA	Movie	31/01	19:34	93	18.6%	39.8%
TURBULENCE	USA	Movie	21/02	19:36	94	18.6%	39.4%
QUEST	USA	Movie	29/12	20:18	87	18.3%	41.9%
HARD TO KILL	USA	Movie	21/11	20:19	90	18.3%	39.2%
CROSSWORLDS	USA	Movie	09/01	20:03	84	18.1%	36.0%
POLICE ACADEMY 6	USA	Movie	10/12	20:13	72	17.8%	39.7%

Sources: AGB Ukraine

INTER							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
ON THE CORNER NEAR PATRIARSHIE	Russia	Movie	4	19:01	51	18.5%	51.1%
WHEEL OF FORTUNE	Russia	Game Show	53	19:03	51	18.4%	57.7%
TIME	Russia	News	309	20:21	31	17.8%	47.5%
SINGING IN BLACKTHORN	UK	Series	10	19:07	46	17.7%	46.9%
THE DETAILS	Ukraine	News	118	20:05	20	17.5%	46.5%
THE PAST	Ukraine	Magazine	190	20:44	4	17.0%	47.2%
THE FRONTIER	Russia	Movie	6	21:00	65	16.7%	40.2%
FAVOURITES OF HIGH SOCIETY	n.a	Series	4	19:06	48	15.2%	41.2%
MAFIA'S PRINCESS	USA	Series	10	19:05	47	15.1%	48.4%
TIME-DETAILS	Ukraine	News	198	19:59	19	15.1%	44.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FEATURES OF NATIONAL FISHING	Russia	Movie	01/01	20:42	95	24.3%	51.0%
BROTHER	USA	Movie	18/03	21:06	95	23.0%	55.6%
HARD TARGET	USA	Movie	08/11	21:21	90	22.4%	57.1%
NATALI JOINS HEARTS. CONCERT	Ukraine	Music	08/03	18:39	67	22.4%	55.6%
COLUMBO/MURDER BY THE BOOK	USA	Movie	19/02	21:01	73	21.9%	49.1%
RUNAWAY CAR	USA	Movie	21/03	21:24	87	21.7%	54.1%
LOHOVSKIY'S BUSINESS	Russia	Movie	25/12	21:29	58	21.6%	52.8%
MONDAY'S CHILDRENS	Russia	Movie	08/01	21:23	88	21.6%	51.7%
DEAD CALM	USA	Movie	28/11	21:35	91	21.2%	57.7%
PAST. TIME AGO	Ukraine	Magazine	31/12	23:39	13	21.2%	38.5%

Sources: AGB Ukraine

UT 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
SMALL TRAMP	Australia	Series	42	17:15	23	3.3%	14.2%
7 DAYS	Ukraine	News	51	20:05	54	3.2%	8.2%
DARK SKY	UK	Series	12	11:31	45	2.9%	14.7%
UTN. PANORAMA	Ukraine	News	316	20:58	37	2.9%	7.6%
BRILLIANT AIZERAKS	France	Series	8	19:27	46	2.8%	6.3%
MEMORIES OF SHERLOCK HOLMES	UK	Series	5	12:16	50	2.6%	14.0%
RETURNING OF SHERLOCK HOLMES	UK	Series	4	12:16	51	2.5%	15.0%
QUESTIONS OF THE DAY	Ukraine	Magazine	93	21:46	5	2.5%	7.6%
SPORT'S WORLD	Ukraine	Sport	116	21:53	10	2.5%	7.4%
WHIRLWIND OF FLOWERS	France	Series	9	19:15	49	2.5%	6.1%

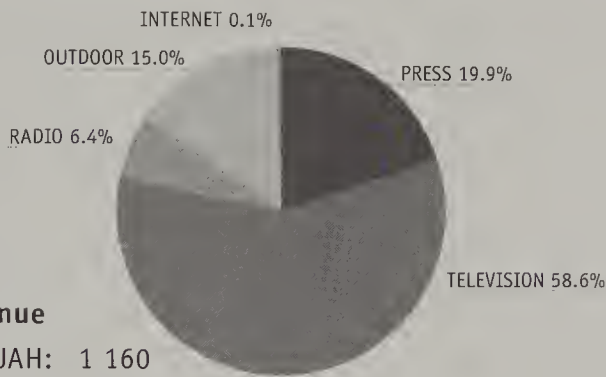
Top 10 Single Programmes	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CL BAYERN MUNICH-DINAMO KYIV	Sport	21/04	21:35	100	20.2%	51.3%
FBAL CL DINAMO KYIV-BAYERN MUNICH	Sport	07/04	21:35	102	19.4%	52.4%
FBAL CL DINAMO KYIV-REAL MADRID	Sport	17/03	21:35	101	18.4%	48.0%
FBAL CL DINAMO KYIV-LAZIO ITALY	Sport	02/11	21:35	108	17.0%	49.9%
FBAL CL REAL MADRID-DINAMO KYIV	Sport	03/03	21:35	102	15.8%	42.6%
FBAL CL DINAMO KYIV-REAL MADRID	Sport	24/11	21:33	110	14.3%	42.5%
FBAL CL BAYERN MUNICH-DINAMO KYIV	Sport	07/12	21:35	108	14.1%	41.3%
FBAL EU CUP FRANCE-UKRAINE	Sport	27/03	21:41	103	14.0%	36.7%
FBAL CL MARRIBOR SLOVENIA-DINAMO KYIV	Sport	27/10	21:40	100	13.6%	41.4%
FBAL EU CUP UKRAINE-ICELAND	Sport	31/03	18:55	103	13.0%	33.1%

Sources: AGB Ukraine

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million UAH)	1 160
Total adspend	(in million USD)	281
Total adspend	(in million EUR)	228
TV adspend	(in million UAH)	680
TV adspend	(in million USD)	165
TV adspend	(in million EUR)	163
TV adspend	in % of GDP	0.54
TV adspend	per capita (USD)	6.5

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

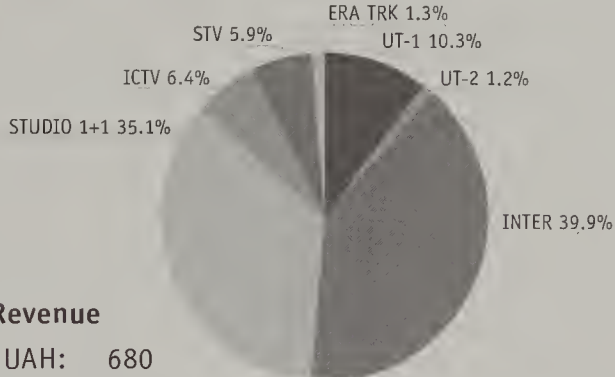


Total Revenue
in million UAH: 1 160
in million EUR: 228

TV ADVERTISING STATISTICS	
Total number of spots broadcast	253 939
Average spot length (in sec.)	26
Total number of advertisers	n.a.
Number of TV advertisers	983
Total number of advertised products	n.a.
Number products advertised on TV	3 508

Source: AGB Ukraine

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Total TV Revenue
in million UAH: 680
in million EUR: 163

TOP 10 ADVERTISING FIGURES		
TV Advertising Sectors	Television	Share of TV Expenditure
HYGIENE PRODUCTS	19.1	11.6%
CONFECTIONERY	15.2	9.2%
MASS MEDIA	13.6	8.3%
ENTERTAINMENTS	12.0	7.3%
HOUSEHOLD CHEMICAL GOODS	11.7	7.1%
NONALCOHOLIC BEHAVERAGES	10.6	6.5%
SOCIAL ADVERTISING	4.9	3.0%
MEDICAL PREPARATION	4.7	2.9%
FOODSTUFFS	4.5	2.7%
STRONG DRINKS	3.3	2.0%
OTHER	65.1	39.5%
TV Advertisers		
PROCTER & GAMBLE	19.7	12.0%
UNILEVER	5.5	3.3%
KRAFT JACOBS SUCHARD	4.6	2.8%
NESTLE	4.4	2.7%
WRIGLEY	3.6	2.2%
COCA-COLA	3.3	2.0%
DANDY	3.2	1.9%
MARS LLC	2.7	1.6%
BENCKISER	2.7	1.6%
COLGATE-PALMOLIVE COMPANY	2.6	1.6%
OTHER	112.5	68.3%
Total (in million USD)	164.6	100.0%
Total (in million EUR)	163	100.0%

Sources: AGB Ukraine

Overseas

There are five main private broadcasters in Brazil and two public broadcasters. The public broadcasters, TV Cultura and TV Educativa, are not very popular and have less than 5% of the total audience share.

Television in Brazil originally had strong ties with the government. In the old days, television was always very supportive of the residing military government and broadcasts were thus biased. This changed with the new republic and television became more democratic. Censorship was forbidden and freedom of opinion encouraged. Foreign investors are still not allowed but it is hoped that this ban will soon be lifted.

All 5 of the main commercial networks produce most of their programming centrally and then leave it to their regionally based stations to add their own advertising. Much of Brazilian television consists of local productions rather than foreign import with the main exception being films. It is very rare for people to see a Brazilian film on their television screen. Most films are imported from the US.

TV Globo is one of the 10 largest private television companies in the world and the main network in Brazil. It was founded in 1965 and still takes more than half of the total audience share. The network consists of 9 channels and 90 affiliates and has a total reach of 100%. Advertising expenditure in Globo is, perhaps obviously, also far greater than in other channels. Approximately 80% of Globo's programming is made up of own-productions; this includes its own telenovelas which are broadcast every evening during prime-time. Telenovelas are big business in Brazil and always bring satisfactory audience figures. The company also holds the rights to a variety of football events: the Football World Cup on 2002 and 2006 and the Brazilian National League until 2004. As long as they still hold these rights, audience figures will remain high.

SBT, Sistema Brasileiro Televisao, is Brazil's second biggest terrestrial commercial broadcaster. It is not going to topple Globo's seat at the top but it is slowly increasing in popularity. This channel also shows a number of telenovelas but these are produced by Mexican company "Televisa" and bought by the channel. The main target group is a lower class, mass audience and the variety of gameshows and lotteries broadcast on the channel are meant to appeal to just these people. The owner of SBT is a well-known chat show host, Silvio Santos.

Record is the third most popular channel and is owned by a former TV evangelist. The broadcaster has, however, reduced the amount of religious programming and introduced telenovelas and US series like the X-Files.

The public channels are not popular; their mix of educational programmes and coverage of local parliament does not tend to attract a large audience. The only public channel to be vaguely successful is TV Cultura. Professionals have praised its programming, in particu-

lar its children's programming, which has also been sold to various other broadcasters, calling it innovative. The channel is financed by the government of San Paolo but this has no influence on the programming.

There are very few journalistic or cultural programmes on Brazilian television – a few news bulletins but not much more. According to law, every channel must broadcast one hour of educational programming on weekdays but this is normally strategically placed between the hours of 6:00 and 8:00 a.m.

A typical daily schedule in Brazil consists of cartoons and children's series in the morning and early afternoon, followed by telenovelas and Hollywood movies during prime-time. Game shows are also very popular and some can last, quite literally, hours. The Game show "Who wants to be a millionaire", which has been broadcast on SBT since november 1999 could get audience shares of more than 30% in march and april 2000, topping the audience shares of TV Globo programmes, broadcast at the same time.

Cable television began very slowly in Brazil as most people were content with the already existing terrestrial channels. In the mid 1990's, the industry experienced a boom as many people experienced an increase in income and many were far more open to technological development. Between 1995 and 1996, subscriptions to cable nearly doubled. In contrast, 1998 and 1999 were very slow years as a slight economic recession began and at the same time, cable prices increased sharply. The two main operators are the Globo concern and TVA. As in terrestrial television, Globo is by far the bigger of the two and seems fairly sure of its position at the top.

DTH experienced similar problems to cable as it is only the richer part of the population who would even consider buying a receiver. The two main operators are DirecTV and Sky. Although Sky is newer on the Brazilian market, it has more subscribers than its competitor. Sales were also slow in 1999 and the pay-TV market must consider how it is to continue. As the situation stands, cable, MMDS and DTH are all too expensive for the average Brazilian citizen and are a luxury which many do not yet consider necessary.

Brazil

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COUNTRY

Land area (km ²)	8 511 965
Total population	170 100 000
Number of households	43 660 000
Average household size	3.9

In % of households equipped

Phone*	49.0
Mobile telephone subscribers*	24.9
PC's*	13.7
Internet access*	4.5
Internet users*	10.9

Sources: Grupo de Mídia, Computer Industry Almanac IBOPE – Target group Inbex Brasil
– 11 metropolitan regions

ECONOMICS

GDP in million USD (at current prices)	584 634
GDP per capita in USD (at current prices)	3 437
Inflation rate in 1999 (in %)	19.8
Value of BRL in Euro (EUR)*	1 EUR = 1.87 BRL
Value of BRL in US-Dollar (USD)*	1 USD = 1.85 BRL

Sources: Latin Focus

*Average rate 1999 Banco Central

TV OVERVIEW

Total number of TV households (TVHH)	39 500 000
In % of all households	90.5
Numbers of channels received by 70% of the population	3

Source: Grupo de Mídia

TV EQUIPMENT

	in % of TVHH
Colour TV	84.0
Multiset (homes with more than 1 TV set)	n.a.
VCR	45.0
Teletext	n.a.
Remote control*	63.3

Source: Grupo de Mídia *IBOPE – Target group Inbex Brasil – 11 metropolitan regions

TV DISTRIBUTION

		in % of TVHH
Cable	passed	22.0
	connected	6.7
Satellite	private dish/DTH	4.0
	collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	0.4

TV SUBSCRIPTION

Analog pay TV subscribers	2 495 000	Digital TV subscribers	736 000
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Sources: Media Data 1998/Zenith estimates, Variety

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
TV CULTURA	1969	T, C, S	100%	Portuguese	n.a.	Culture	Gvt, Spon.	n.a.
TV EDUCATIVA	n.a.	T, C, S	68%	Portuguese	n.a.	Education	Gvt	n.a.
TV CÂMARA	1998	T, C, S	n.a.	Portuguese	168	Politics	n.a.	n.a.
TV SENADO	1996	T, C, S	n.a.	Portuguese	168	Politics	n.a.	n.a.

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
TV GLOBO	1965	T, C, S	100.0%	Portuguese	161	Generalist	Adv.	n.a.
SBT	1983	T, C, S	94.5%	Portuguese	140	Generalist	Adv.	n.a.
BANDEIRANTES	1981	T, C, S	88.7%	Portuguese	140	Generalist	Adv.	n.a.
TV RECORD	1967	T, C, S	76.7%	Portuguese	154	Generalist	Adv.	n.a.
TV MANCHETE/REDE TV*	1983	n.a.	66.0%	Portuguese	133	Generalist	Adv.	n.a.
CNT	n.a.	n.a.	33.7%	Portuguese	140	Generalist	Adv.	n.a.

Source: Grupo de Mídia

* In May 1999 there has been a relaunch of TV Manchete as Rede TV

PAY TV (ANALOG)					
Channels	Language	Programming	Subscribers	Cable Distributor	Sales House
RURAL	Portuguese	Agrar	2 073 000	NET	RBS
SHOPTIME	Portuguese	Teleshopping	1 700 000	NET	Globosat
ART ARAB RADIO & TELEV.	Arabic	Generalist	403 000	NET/TVA	Multipole
DEUTSCHE WELLE**	German	Generalist	1 377 000	NET	n.a.
RAI INTERNATIONAL	Italy	Generalist	1 182 000	NET/TVA	Starsat
PTPI – RADIO RV INTERN.	Portuguese	Generalist	1 129 000	TVA	n.a.
TV 5	French	Generalist	1 800 000	TVA	n.a.
ANIMAL PLANET	English/Port.	Documentary	310 000	n.a.	n.a.
DISCOVERY CHANNEL	Portuguese	Documentary	2 472 000	NET/TVA	Discov. Netw.
GNT	Portuguese	Documentary	1 698 000	NET	Globosat
MUNDO	English/Port./Sub.	Documentary	767 000	TVA	TVA
PEOPLE & ARTS	Portuguese	Documentary	2 199 000	NET	Discov. Netw.
CANAL MEDICO	Portuguese	Education	60 000	n.a.	n.a.
FUTURA	English/Port.	Education	797 000	NET	n.a.
ESPN BRASIL	Portuguese	Sport	949 000	TVA	Starsat
ESPN INTERNATIONAL	English/Port.	Sport	2 293 000	NET/TVA	Starsat
SPORTV	Portuguese	Sport	1 726 000	NET	Globosat
CANAL ADULTO	Portuguese	Erotic	21 000	n.a.	n.a.
PLAYBOY TV LATIN AMERICA	Portuguese	Erotic	2 000 000	NET	Starsat
AXN (TELEUNO)	Portuguese/Sub.	Entertainment	1 900 000	NET/TVA	HBO Brasil
CANAL BRASIL	Portuguese	Entertainment	660 000	NET	Globosat
CINEMAX	English/Portuguese	Entertainment	433 000	TVA	HBO Brasil
EURO CHANNEL	English	Entertainment	903 000	TVA	Starsat
FOX	Portuguese	Entertainment	2 080 000	NET/TVA	Flac do Brasil
HALLMARK 1, 2	English/Portuguese	Entertainment	322 000	n.a.	n.a.
HBO HBO 2	Portugese/Sub.	Entertainment	802 000	TVA	HBO Brasil

PAY TV (ANALOG)					
Channels	Language	Programming	Subscribers	Cable Distributor	Sales House
MGM GOLD	English/Portuguese	Entertainment	1 250 000	NET/TVA	Starsat
SONY ENTERTAINMENT TELEV.	Portuguese	Entertainment	2 130 000	NET/TVA	HBO Brasil
TELECINE 1	Portuguese	Entertainment	1 404 000	NET	Globosat
TELECINE 2	Portuguese	Entertainment	675 000	NET	Globosat
TELECINE 3	Portuguese	Entertainment	675 000	NET	Globosat
TELECINE 4	Portuguese	Entertainment	675 000	NET	Globosat
TELECINE 5	Portuguese	Entertainment	675 000	NET	Globosat
TNT	Portuguese	Entertainment	2 487 000	NET/TVA	Globosat
USA NETWORK	Portuguese	Entertainment	1 678 000	NET	Globosat
WBTV (WARNER BROS.)	Portuguese/Sub.	Entertainment	2 131 000	NET/TVA	HBO Brasil
CATOON NETWORK	Portuguese	Children	2 419 000	NET/TVA	Turner Int. Br.
DISCOVERY KIDS	Portuguese	Children	1 340 000	NET	n.a.
FOX KIDS	Portuguese	Children	1 112 000	NET/TVA	Flac do Brasil
LOCOMOTION	English/Portuguese	Children	285 000	NET	Starsat
NICKELODEON	Portuguese	Children	1 086 000	NET/TVA	MTV Brasil
BBC WORLD	English	News	960 000	NET	n.a.
BLOOMBERG	English/Portuguese	News	1 369 000	NET	Starsat
CBS TELENOTICIAS Brasil	Portuguese	News	765 000	TVA	TM-Media Ent.
CNN SPAIN	Spanish	News	1 751 000	NET/TVA	Turner Int. Br.
CNN INTERNATIONAL	English	News	2 255 000	NET/TVA	Turner Int. Br.
GLOBO NEWS	Portuguese	News	1 696 000	NET	Globosat
TV SENAC	Portuguese	News	1 750 000	NET	n.a.
THE WEATHER CHANNEL	Portuguese	Weather	478 000	Independent	TV Tempo
CMT-COUNTRY MUSIC	Portuguese	Music	829 000	TVA	Starsat
MCM	Portuguese	Music	227 000	Independent	Multipole
CANAL DE LAS ESTRELAS	Spanish	Generalist/Ent.	500 000	NET	n.a.
E!	English/Portuguese	Generalist/Ent.	567 000	TVA	HBO Brasil
FILM & ARTS	English/Portuguese	Generalist/Ent.	681 000	TVA	Starsat
MULTISHOW	Portuguese	Generalist/Ent.	1 716 000	NET	Globosat
THE SUPERSTATION	English	Generalist/Ent.	1 750 000	NET	Starsat

Sources: Grupo de Mídia, Pay TV Channel Guide 2000

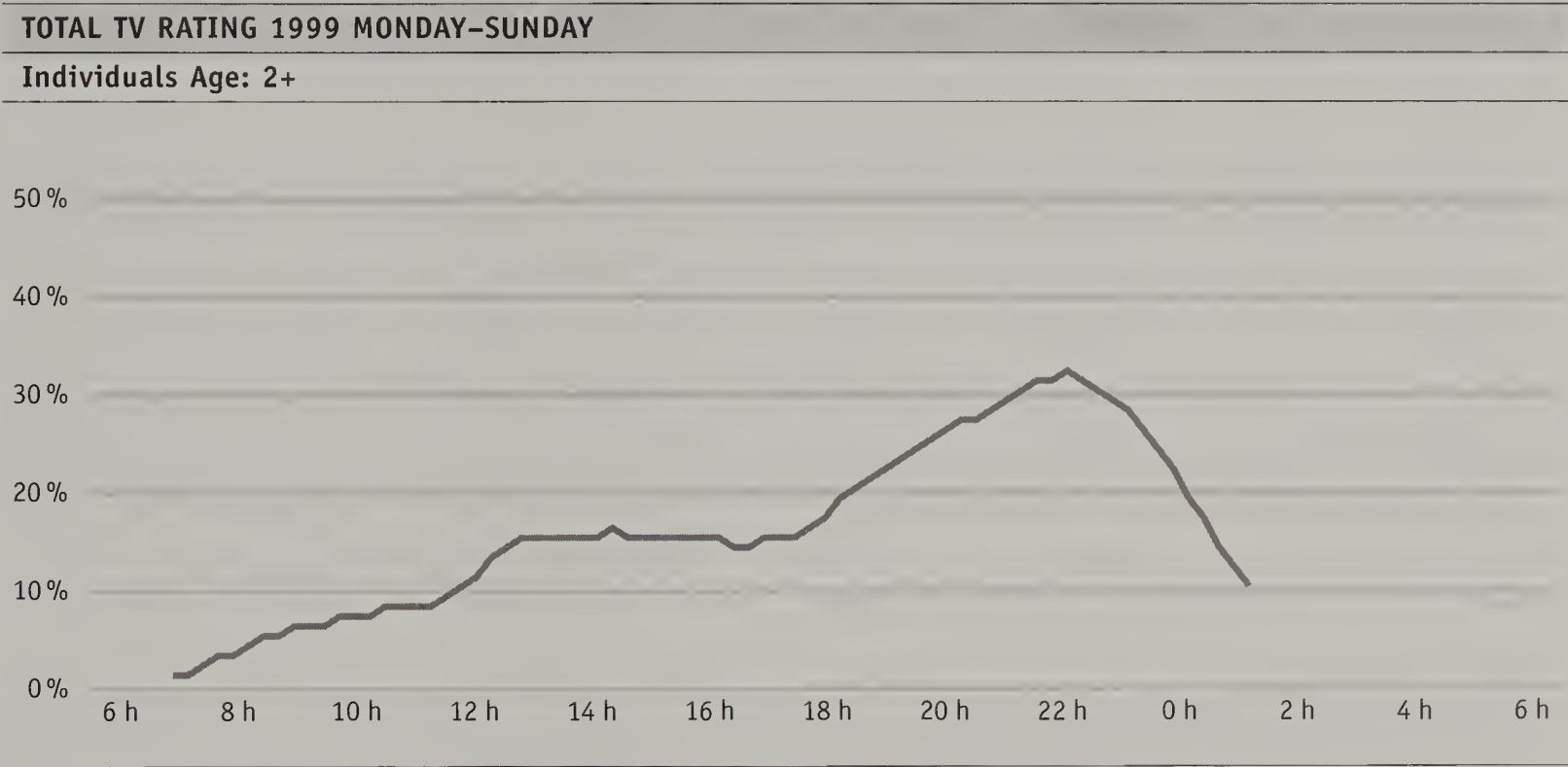
DIGITAL PACKAGES							
Channels	Launch	Diffusion	Decoder	Subscribers	Language	No. of Ch.	Revenue
DIRECT TV	1996	S	n.a.	265 000	n.a.	n.a.	n.a.
SKY	1997	S	n.a.	408 000	n.a.	n.a.	n.a.

Source: Variety

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	IBOPE
Panel/Sampling Size	2 620 households
Instrument used (people-meter, telefon, face-to-face)	People-meter
Sample universe (11 metropolitan regions) in 000	
Individuals 2+	49 925
Adults 15+	37 953
Housewives 15+	13 473
Children 2-14	11 972

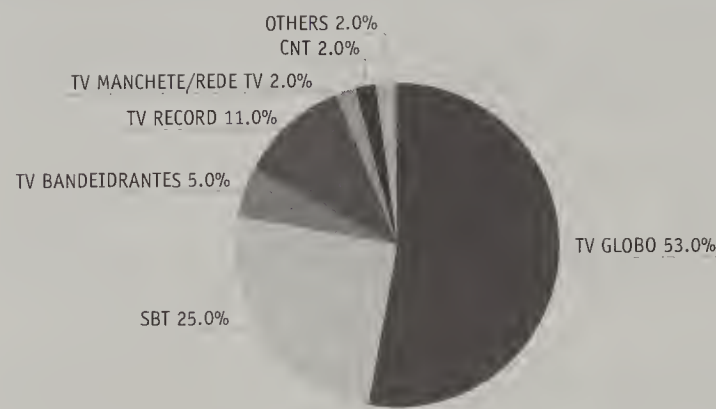
Source: IBOPE



Source: IBOPE AIP PNT, Nov. 99

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS
Individuals 2+, all day (06:00–24:00)



Source: IBOPE

AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY				
	Individuals 2+			
	1996*	1997**	1998**	1999***
TV GLOBO	62.0%	56.0%	56.9%	53.0%
SBT	17.0%	23.0%	19.9%	25.0%
TV BANDEIDRANTES	6.0%	6.0%	5.5%	5.0%
TV RECORD	4.0%	6.0%	9.3%	11.0%
TV MANCHETE/REDE TV	5.0%	4.0%	3.3%	2.0%
CNT	2.0%	2.0%	1.7%	2.0%
OTHERS	4.0%	3.0%	3.4%	2.0%

Source: IBOPE Brazil

*07:00–24:00 **06:00–24:00 ***November 1999

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS 1998			
	Individuals 2+		
	Morning 6–12 h	Afternoon 12–18 h	Evening 18–24 h
TV GLOBO	54.0%	52.0%	61.0%
SBT	21.0%	24.0%	20.0%
TV BANDEIDRANTES	12.0%	10.0%	9.0%
TV RECORD	6.0%	6.0%	4.0%
TV MANCHETE/REDE TV	2.0%	2.0%	3.0%
CNT	2.0%	1.0%	1.0%
OTHERS	4.0%	4.0%	2.0%

Source: IBOPE Brazil

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)						
Title	Land	Channel	Genre	Start.Time	Week	Audience
FBAL	Brazil	TV Globo	Sport	n.a.	28	49%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	43	49%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	45	48%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	46	48%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	47	47%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	42	47%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	41	46%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	40	46%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	37	46%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	39	45%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	38	44%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	34	44%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	49	44%
JORNAL NACIONAL		TV Globo	News	20:00	45	43%
JORNAL NACIONAL		TV Globo	News	20:00	44	43%
JORNAL NACIONAL		TV Globo	News	20:00	46	43%
JORNAL NACIONAL		TV Globo	News	20:00	20	43%
TERRA NOSTRA		TV Globo	Series-Daily Soap	20:30	32	43%
JORNAL NACIONAL		TV Globo	News	20:00	33	43%
GLOBO REPORTER		TV Globo	Magazine	21:45	40	42%

Source: IBOPE Period: April–December 1999

Top Programmes Channel by Channel

TV GLOBO					
Top 10 Single Programmes	Land	Genre	Week	Start.Time	Audience
FBAL		Sport	28	n.a.	49%
TERRA NOSTRA	Brazil	Series-Daily Soap	43	20:30	49%
TERRA NOSTRA	Brazil	Series-Daily Soap	45	20:30	48%
TERRA NOSTRA	Brazil	Series-Daily Soap	46	20:30	48%
TERRA NOSTRA	Brazil	Series-Daily Soap	47	20:30	47%
TERRA NOSTRA	Brazil	Series-Daily Soap	42	20:30	47%
TERRA NOSTRA	Brazil	Series-Daily Soap	41	20:30	46%
TERRA NOSTRA	Brazil	Series-Daily Soap	40	20:30	46%
TERRA NOSTRA	Brazil	Series-Daily Soap	37	20:30	46%
TERRA NOSTRA	Brazil	Series-Daily Soap	39	20:30	45%

Source: IBOPE Period: April–December 1999

SBT					
Top 10 Single Programmes	Land	Genre	Week	Start.Time	Audience
SILVIO SANTOS	Brazil	Variety Show	32	13:00	23%
SILVIO SANTOS	Brazil	Variety Show	25	13:00	23%
TELA DE SUCESSOS	n.a.	Movie	21	22:00	22%
SILVIO SANTOS	Brazil	Variety Show	24	13:00	22%
SILVIO SANTOS	Brazil	Variety Show	26	13:00	22%
SILVIO SANTOS	Brazil	Variety Show	34	13:00	22%
SILVIO SANTOS	Brazil	Variety Show	32	13:00	22%
WHO WANTS TO BE A MILLIONARE	Brazil	Game Show	47	n.a.	22%
SILVIO SANTOS	Brazil	Variety Show	39	13:00	21%
LA USURPADORA	Mexico	Daily Soap	46	17:00	21%

Source: IBOPE Period: April–December 1999

TV RECORD					
Top 10 Single Programmes	Land	Genre	Week	Start.Time	Audience
SUPER TELA	n.a.	Movie	48	22:15	24.0%
PROGRAMA RAUL GIL	Brazil	Talk Show	33	12:30	13.0%
TELÉ MAXIMA	n.a.	n.a.	18	12:30	13.0%
PROGRAMA RAUL GIL	Brazil	Talk Show	22	12:30	13.0%
PROGRAMA RAUL GIL	Brazil	Talk Show	19	12:30	13.0%
PROGRAMA RAUL GIL	Brazil	Talk Show	14	12:30	12.0%
PROGRAMA RAUL GIL	Brazil	Talk Show	36	12:30	12.0%
PROGRAMA RAUL GIL	Brazil	Talk Show	30	12:30	12.0%
PROGRAMA RAUL GIL	Brazil	Talk Show	15	12:30	12.0%
PROGRAMA RAUL GIL II	Brazil	Talk Show	50	13:30	12.0%

Source: IBOPE Period: April–December 1999

BANDEIRANTES					
Top 10 Single Programmes		Genre	Week	Start.Time	Audience
FBAL MERCO SUL CUP		Sport	48	n.a.	17.0%
FBAL MERCO SUL CUP		Sport	37	n.a.	12.0%
VBAL PAN AMERICA 99		Sport	31	n.a.	12.0%
FBAL MERCO SUL CUP		Sport	42	n.a.	11.0%
FBAL MERCO SUL CUP		Sport	40	n.a.	11.0%
FBAL MERCO SUL CUP		Sport	48	n.a.	10.0%
FBAL MERCO SUL CUP		Sport	46	n.a.	10.0%
FBAL MERCO SUL CUP		Sport	39	n.a.	10.0%
FBAL MERCO SUL CUP		Sport	44	n.a.	9.0%
FBAL MERCO SUL CUP		Sport	32	n.a.	9.0%

Source: IBOPE Period: April–December 1999

TV MANCHETE/REDE TV					
Top 10 Single Programmes	Land	Genre	Week	Start.Time	Audience
FBAL AMÉRICA CUP		Sport	27	n.a.	6.0%
SHOW DO ESPORTE	Brazil	Sport News	27	n.a.	6.0%
SABADO EM HOLLYWOOD	n.a.	n.a.	27	21:00	4.0%
SESSAO ESPECIAL	n.a.	n.a.	27	n.a.	4.0%
FBAL		Sport	27	n.a.	4.0%
TV ESCOLHA 2	n.a.	Movie	46	16:00	4.0%
FBAL		Sport	47	n.a.	3.0%
TV ESCOLHA 1	n.a.	Movie	46	14:00	3.0%
PANTANAL	Brazil	Daily Soap	24	n.a.	3.0%
TE VI A TV	Brazil	Comedy Show	47	n.a.	3.0%

Source: IBOPE Period: April–December 1999

CNT					
Top 10 Single Programmes	Land	Genre	Week	Start.Time	Audience
FESTA DO MALLANDRO	Brazil	Variety Show	30	21:00	3.0%
FESTA DO MALLANDRO	Brazil	Variety Show	43	21:00	3.0%
FESTA DO MALLANDRO	Brazil	Variety Show	38	21:00	3.0%
FESTA DO MALLANDRO	Brazil	Variety Show	23	21:00	3.0%
FESTA DO MALLANDRO	Brazil	Variety Show	26	21:00	3.0%
FESTA DO MALLANDRO	Brazil	Variety Show	29	21:00	3.0%
FESTA DO MALLANDRO	Brazil	Variety Show	45	21:00	3.0%
FESTA DO MALLANDRO	Brazil	Variety Show	32	21:00	3.0%
FESTA DO MALLANDRO	Brazil	Variety Show	39	21:00	3.0%
VIDA DE ARTISTAS	Brazil	Variety Show	25	21:30	3.0%

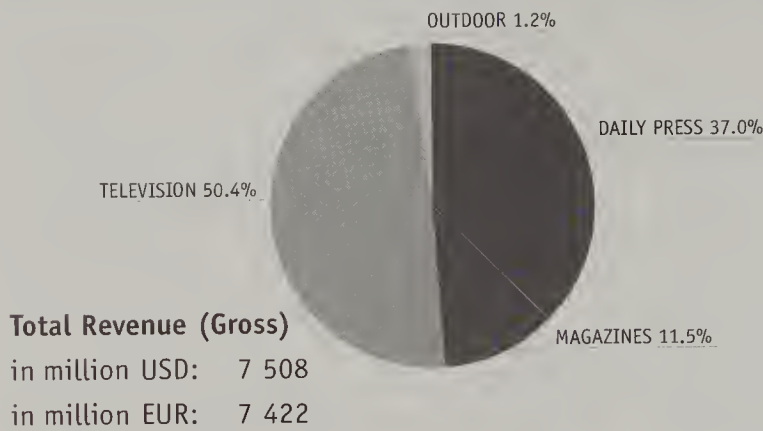
Source: IBOPE Period: April–December 1999

Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million USD)	7 508
Total adspend (in million EUR)	7 422
TV adspend (in million USD)	3 784
TV adspend (in million EUR)	3 741
TV adspend in % of GDP	0.65
TV adspend per capita (USD)	22.2

Source: IBOPE Monitor

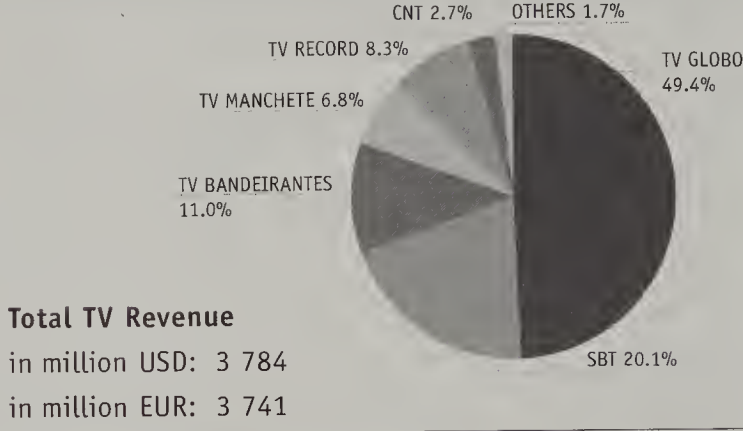
SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Source: IBOPE Monitor

TV ADVERTISING STATISTICS	
Total number of spots broadcast	622 729
Average spot length (in sec.)	30.0
Total number of advertisers	35 170
Number of TV advertisers	13 346
Total number of advertised products	43 540
Number products advertised on TV	15 823

SHARE OF TV ADVERTISING REVENUE
Channels: Advertising Market Share in %



Source: Media Data

TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	3 Media*	Television	Spent in TV	Share of TV Expenditure
COMMERCE (RETAIL)	1 890.0	792.0	41.9%	21.5%
SERVICES (CONSUMER)	1 096.0	524.0	47.8%	13.6%
SERVICES (GOVERNMENT)	438.0	324.0	74.0%	8.4%
CULTURE, ENTERTAINMENT, TOURISM	603.0	244.0	40.4%	6.3%
LOTTERY	274.0	240.0	87.5%	6.0%
FOOD	274.0	227.0	82.7%	5.6%
MEDIA	493.0	202.0	41.0%	5.4%
FINANCIAL SERVICES	438.0	212.0	48.4%	5.3%
BEVERAGES	216.0	190.0	87.9%	5.0%
VEHICULES	329.0	178.0	54.2%	4.4%
OTHERS	1 457.0	651.0	44.7%	18.5%
TV Advertisers				
GESSY LEVER	104.4	91.1	87.2%	2.5%
LIDERANCA CAPITALIZACAO	66.9	65.7	98.2%	1.8%
EMBRATEL	70.9	61.3	86.5%	1.6%
PROCTER AND GAMBLE	64.6	58.5	90.1%	1.6%
GENERAL MOTORS	79.5	52.6	66.2%	1.4%
COCA COLA	45.7	43.4	95.0%	1.2%
ITAU	62.7	42.2	67.3%	1.1%
GRUPO IMAGEM	39.9	39.9	100.0%	1.1%
BRAHMA	40.3	39.2	97.2%	1.1%
VOLKSWAGEN	90.1	38.2	42.4%	1.0%
OTHERS	7 507.4	3 183.5	4.3%	85.7%
Total (in million USD)	7 508.0	3 784.0	50.4%	100.0%
Total (in million EUR)	7 421.9	3 741.0	50.4%	100.0%

Source: IBOPE Monitor *Press, TV and Outdoor

The year 2000 represents a possible turning point in the field of television in Israel. In January, the government introduced a blue print for the creation of a new commercial channel (that became law in March). In August, Direct Broadcast Satellite was to commence broadcasting and by the end of the year, tenders for new government sanctioned thematic channels are due as well as a restructuring of the regulatory framework for licensing television. All this in a market characterized by a concentrated and limited ownership structure and slow development of local TV fare.

Launched in 1968, Israeli Television Channel 1 had been the lone broadcaster in Israel until the beginning of the 1990's. Channel 1 still operates under the auspices of the Israel Broadcasting Authority; a European modeled public broadcaster and member of the European Broadcasting Union. In the early 1990's cable television was launched offering a locally packaged bouquet of channels (children, family, sports, movies and culture), and in November 1993 the first commercial channel, channel 2, was inaugurated.

Israeli television resembles Western standards as far as its programme fare structure. Channel 1, a public channel, concentrates on news and current affairs. Channel 2 carries all versions of game shows and sitcoms including Hebrew versions of "Who wants to be a millionaire" (top rated programme in the summer of 2000) and of "All in the Family". The cable companies run a bouquet of channels of which the children channel has the most locally produced programming but highlights dubbed versions of "Pokemon" just as much. The movie and family channels carry all the latest American sitcoms and series and rarely locally produced shows. In addition, most of the cable fare consists of satellite channels from all European countries. In 2000, the channels "Hallmark", "ESPN" and BBC Prime joined the traditional CNN, MTV, Eurosport, Sky News and Star TV, which have been on the system since day one.

As part of the cable television system, a sixth of the system's capacity is reserved for use by the government. This portion was only utilized for the introduction of a teleshopping network in the mid 1990's. A government plan initiated in the second half of the 90's allotted these channels for "thematic" use aimed minorities who were not receiving adequate representation on the national channels (Arabs, religious groups and new immigrants). Tenders for those channels as well as for a 24-hour news channel and a "Mediterranean" music channel are expected this year. In addition, with the launch of "Yes" the DBS service, some new locally packaged channels are expected.

In March 2000, the Israeli Parliament, the Knesset, enacted an amendment to the commercial television law under which an additional channel, dubbed "channel 3" will be launched in the near future. Channel 3 will be operated by two franchise holders that will broadcast 3 days each (and rotate on the Saturday), unlike channel 2,

which is operated by three franchise holders that broadcast two days each. The law makes it clear that only new players can bid for these franchises. By the end of July, the government introduced a new bill that if passed will allow the introduction of cable carried channels without the need for a tender process, but by virtue of licences only. The cable companies that currently own two of their respective channels (family and movies) and sanction three (children, culture and sports) will not be allowed, under the new law, to receive licences for channels.

The introduction of DBS in the summer of 2000 will be associated with the introduction of digitized service on the cable infrastructure as well. The cable companies are refrained from offering a tiered service for the first 9 months of the DBS service, but plan to offer on their digital platform Pay TV channels that will consist of Pay Per View services. According to the legal situation in Israel, as determined by the attorney general, and until the law is changed, cable television companies are not allowed to offer broadband data services.

The new legal structure fathomed by the government will create a 10% minimum local programming requirement on the cable channels. This will add to a 40% requirement of the terrestrial commercial channels, which was raised in 2000 from the original 33% required since 1993. One half of commercial TV's local fare needs to be purchased from independent production houses. The public television channel is required for 40% of its production budget to be spent on local talent external to the channel.

Advertising in Israel is allowed only on the commercial channel 2 and will be allowed on channel 3 when launched. Channel 1 is limited to sponsorships and public service announcements, as it is almost fully financed by a licence fee. No advertising is allowed on cable television channels. The Israel Audience Research Board, and its franchise holder Tele-Gal, conduct a nationwide peplemeter system of 400 homes (raised in 2000 from 350 homes) that serves all broadcasters and the advertisers and advertising agencies. According to the legal structure, advertising is limited to 6 minutes per hour, but the Second Radio and Television Authority, the regulator for commercial television, has allowed the broadcasters to broadcast as much as 10 minutes of advertising during prime time, as long as the daily average is kept at 6 minutes.

Israel

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General Data

COUNTRY	
Land area (km²)	21 671
Total population	6 041 400
Number of households	1 650 600
Average household size	3.6
In % of population equipped	
Phone	97.7
Mobile telephone subscribers	42.0
PC's	41.4
Internet access	17.2
Internet users	10.9

ECONOMICS	
GDP in million ILS (at current prices)	290 932
GDP per capita in ILS (at current prices)	48 727
Inflation rate in 1999 (in %)	1.3
Value of ILS in Euro (EUR)	1 EUR = 4.16 ILS
Value of ILS in US-Dollar (USD)	1 USD = 4.12 ILS

Sources: Central Bureau of Statistics,
Israel Audience Research Board, Bank of Israel, „Globes“

TV OVERVIEW	
Total number of TV households (TVHH)	1 538 000
In % of all households	93.2
Numbers of channels received by 70% of the population	n.a.
TV License-Fee cost per year*	ILS 525.-/EUR 126.2

*for 2000

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.7
Multiset (homes with more than 1 TV set)	44.6
VCR	70.9
Teletext	n.a.
Remote control	95.5

Source: Israel Audience Research Board

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	75.5
Satellite	private dish/DTH	7.2
	collective dish/SMATV	n.a.
Terrestrial	analog	100.0
	digital	none
	MMDS	none

TV SUBSCRIPTION			
Analog pay TV subscribers	none	Digital TV subscribers	none

Source: Israel Audience Research Board

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)							
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue
IBA CHANNEL 1	1968	T, C, S	100%	Hebrew/Arabic	70	Generalist	L-F, Spon.
IBA CHANNEL 3	1993	C, S	75%	Hebrew/Arabic	62	Generalist	Gvt, Spon.
IETV	1963	T, C, S	100%	Hebrew	48	Educational	Gvt, Spon.
IETV CHANNEL 23	1997	C	75%	Hebrew	40	Educational	Gvt, Spon.

Source: Israel Audience Research Board

DOMESTIC CHANNELS (NATIONAL PRIVATE)							
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue
CHANNEL 2	1993	T, C, S	100%	Hebrew	144	Generalist	Adv., Spon.
CHANNEL 3	1990	C	75%	Hebrew	135	Family	Basic Cable
MOVIE CHANNEL	1990	C	75%	Hebrew	129	Movies	Basic Cable
SPORT CHANNEL	1990	C	75%	Hebrew	146	Sport	Basic Cable
CHILDREN CHANNEL	1990	C	75%	Hebrew	101	Children	Basic Cable
CHANNEL 8	1990	C	75%	Hebrew	161	Culture/Science	Basic Cable
SHOPPING CHANNEL	1995	C	75%	Hebrew	168	Tele-Shopping	Sales
HOP!	2000	C	17%	Hebrew	n.a	Young Children	Basic/one oper.
VIVA	1998	C	75%	Hebrew	95	Soap Opera	Basic Cable
LATE SHOW	1990	C	75%	Hebrew	28	Old Movies	Basic Cable

INTERNATIONAL/PAN EUROPEAN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
EUROSPORT	Public	C	75%	English	Sport	Adv.
NATIONAL GEOGRAPHIC	Private	C	n.a.	English/sub. Hebrew	Nature	Adv.
STAR WORLD	Private	C	n.a.	English	Generalist	Adv.
JORDAN TV	Public	T, C	n.a.	Arabic/English	Generalist	n.a.
MIDDLE EAST TV	Private	C, S	n.a.	English/Arabic/sub. Hebr.	Generalist	Adv.
CNN	Private	C	n.a.	English	News	Adv.
BBC WORLD	Public	C	n.a.	English	News, Documentaries	Adv.
MTV	Private	C	n.a.	English	Music	Adv.
VH-1	Private	C	n.a.	English	Music	Adv.
3 SAT	Public	C	n.a.	German	Generalist	L-F
ARTE	Public	C	n.a.	German/French	Generalist	L-F

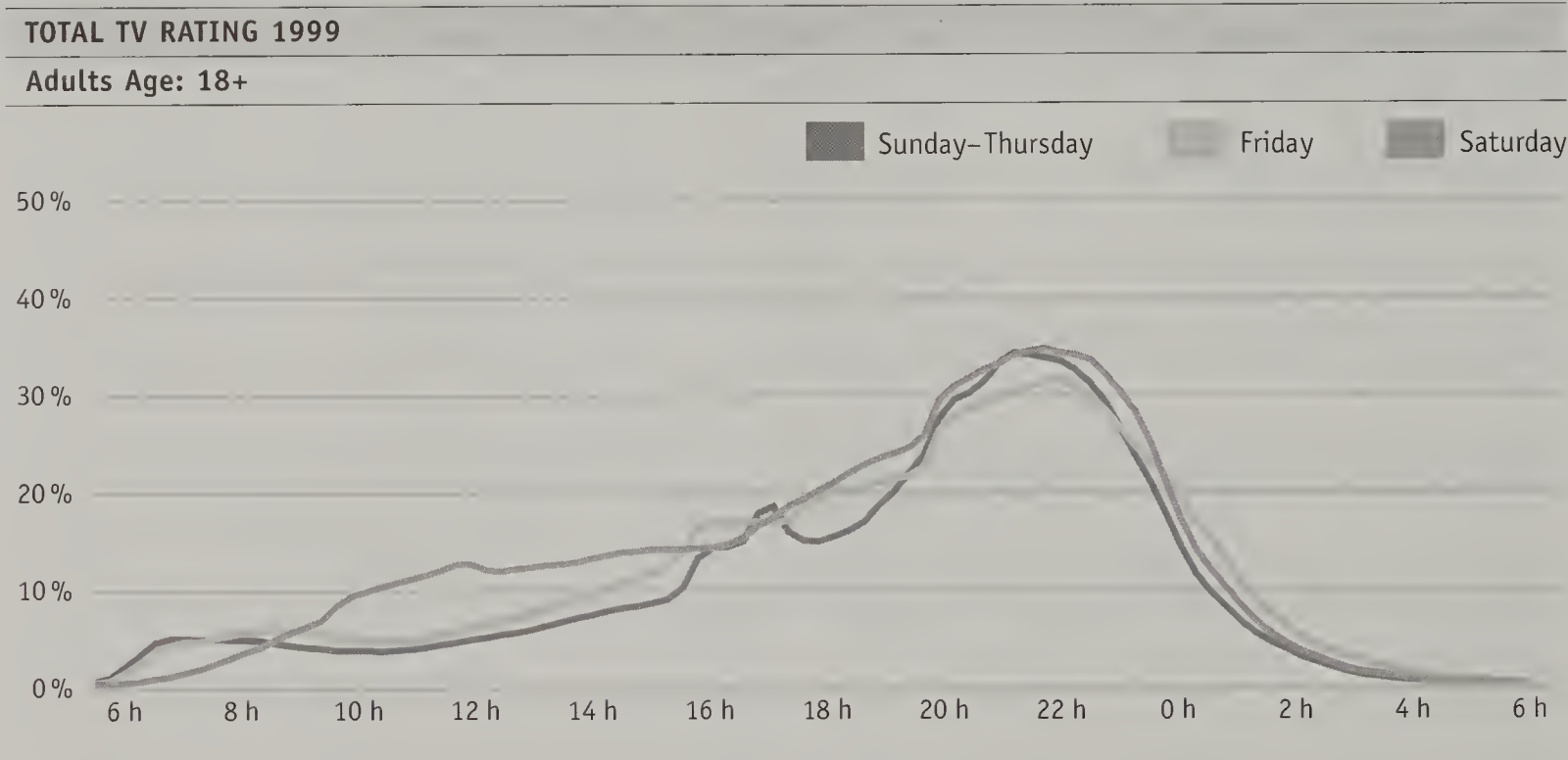
OTHER FOREIGN CHANNELS						
Channels	Nature	Diffusion	Tech. Pen.	Language	Programming	Revenue
NTV	Private	C, S	n.a.	Russian	Generalist	Adv.
RUSSIA 2	n.a.	C, S	n.a.	Russian	Generalist	Adv.
TVE	Public	C	n.a.	Spanish	Generalist	L-F, Adv.
RTL	Private	C	n.a.	German	Generalist	Adv.
SAT 1	Private	C	n.a.	German	Generalist	Adv.
FRANCE 2	Public	C	n.a.	French	Generalist	L-F, Adv.
TV5	Private	C	n.a.	French	Generalist	L-F, Adv.

Source: Israel Audience Research Board

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	TELE-GAL(A.G.B.) LTD. The Israeli Rating Company	
Panel/Sampling Size	385 households/400 households in 2 000	
Instrument used (people-meter, telefon, face-to-face)	People-meter	
	Population size in 000	
Individuals 4+	5 105	
Adults 18+	3 662	
Young Adults 25-44	1 472	
Children 4-11	843	
Children 12-17	601	

Source: Tele-Gal (AGB) Ltd.

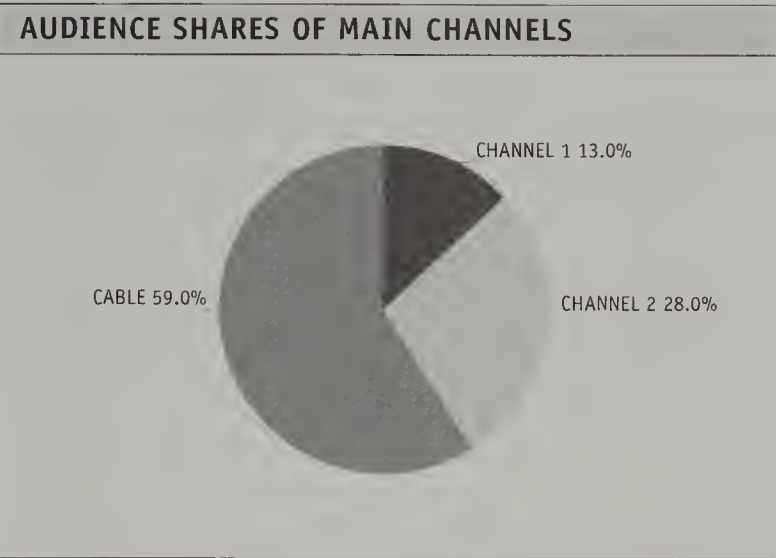


Note: In Israel sunday-thursday are working days

DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)									
	Adults 18+			Young Adults 25-44			Children 4-11		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	n.a.	n.a.	67.9	n.a.	n.a.	69.4	n.a.	n.a.	59.6
Viewing time per Individual	n.a.	n.a.	170	n.a.	n.a.	148	n.a.	n.a.	110

Source: Tele-gal, People-meter reports

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY		
Adults 18+		
	1998	1999
CHANNEL 1	15.4%	13.0%
CHANNEL 2	43.2%	28.0%
CABLE	41.4%	59.0%

Source: Gitam/BBDO, Channel 2

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
GRAND PRIX EURO. DE LA CHAN. 99		Ch.1	Variety Show	22:00	29/05	31.9%	73.0%
MISHAL HAM	Israel	Ch.2-Re.*	Magazine	21:35	13/04	26.2%	58.0%
NEWS 2	Israel	Ch.2-Re.*	News	20:00	19/01	22.0%	58.0%
MISS ISRAEL 1999	Israel	Ch.2-Re.*	Variety Show	20:30	09/03	21.9%	52.0%
TO BE INVESTIGATED-II	Israel	Ch.2-Re.*	Series-Crime	22:59	13/04	20.6%	52.0%
THE FIRST IN THE ENTERTAINMENT	Israel	Ch.2-Ke.**	Talk Show	20:31	01/03	20.3%	50.0%
POTCHIM SHAVUA	Israel	Ch.2-Te.***	Talk Show	21:01	24/01	20.0%	46.0%
FBAL ISRAEL-DENMARK	Israel	Ch.2-Ke.**	Sport	20:00	13/11	19.3%	48.0%
SHEMESH	Israel	Ch.2-Ke.**	Sitcom	21:05	20/02	19.0%	42.0%
MABAT DAILY NEWS	Israel	Ch.1	News	21:00	05/09	18.3%	51.0%
ELECTION 1999	Israel	Ch.1	News	21:38	17/05	17.9%	45.0%
ELECTION PROPAGANDA 1999	Israel	Ch.2-Ke.**	Magazine	20:35	26/04	17.9%	52.0%
SATURDAY News	Israel	Ch.2-Ke.**	News	20:00	02/01	17.3%	44.0%
BLOOPERS-SPECIAL FINAL	Israel	Ch.2-Re.**	Comedy Show	20:31	23/03	17.1%	48.0%
UVDA	Israel	Ch.2-Te.***	Series-General	20:31	14/04	16.8%	47.0%
BLOOPERS	Israel	Ch.2-Re.**	Comedy Show	20:32	19/01	16.8%	42.0%
RAFI RESHEF	Israel	Ch.2-Ke.**	Talk Show	21:41	13/05	16.8%	51.0%
FOCUS-RAFI GINAT	Israel/USA	Ch.2-Re.**	Series-Action	21:27	12/01	16.6%	41.0%
HARD TARGET	USA	Ch.2-Ke.**	Movie	21:41	16/01	16.3%	42.0%
HAHARZUFIM	Israel	Ch.2-Te.***	Comedy Show	20:30	17/01	16.2%	44.0%

Source: Tele-gal, People-meter reports

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
HARD TARGET	USA	Ch.2-Ke.**	21:41	16/01	16.3%	42.0%
CHAIN REACTION	USA	Ch.2-Ke.**	21:41	09/01	15.2%	39.0%
IT TAKES TWO	USA	Ch.2-Re.**	21:07	09/04	14.0%	37.0%
LETHAL WEAPON 2	USA	Ch.2-Ke.**	21:43	23/01	13.4%	40.0%
DIE HARD WITH A VENGEANCE	USA	Ch.2-Te.***	21:24	30/06	13.1%	45.0%
THE EXPERT	USA	Ch.2-Te.***	22:37	14/07	12.9%	46.0%
ERASER	USA	Ch.2-Ke.**	21:44	26/06	12.9%	39.0%
COMMANDO	USA	Ch.2-Ke.**	21:42	11/12	12.4%	35.0%
SPEED	USA	Ch.2-Ke.**	21:37	23/10	12.1%	40.0%
THE NUTTY PROFESSOR	USA	Ch.2-Ke.**	21:41	30/10	12.1%	38.0%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL ISRAEL-DENMARK		Ch.2-Ke.**	20:00	13/11	19.3%	48.0%
FBAL HAPOEL HAIFA-MACABI HAIFA		Ch.2-Ke.**	17:05	06/02	15.5%	49.0%
FBAL SPAIN-ISRAEL		Ch.1 (IBA)	19:30	10/10	13.9%	42.0%
FBAL CYPRUS-ISRAEL		Ch.1 (IBA)	18:15	05/09	13.1%	46.0%
FBAL DENMARK-ISRAEL		Ch.2-Ke.**	19:46	17/11	12.8%	37.0%
FBAL BEITAR JERUSALEM-MACABI HAIFA		Ch.2-Ke.**	17:05	13/02	12.5%	44.0%
MACAB TEL-AVIV-TAUE SPAIN		Ch.1 (IBA)	20:45	04/02	11.7%	28.0%
FBAL HAPOEL TEL-AVIV-HAPOEL HAIFA		Ch.2-Ke.**	17:05	20/02	11.4%	40.0%
FBAL BEITAR JERUSALEM-MACABI TEL-AVIV		Ch.1 (IBA)	18:41	02/02	11.4%	37.0%
FBAL HAPOEL BEIT-SHEAN-MACABI HAIFA		Ch.2-Ke.**	17:05	30/01	11.1%	39.0%

Source: Tele-gal, People-meter reports

*Reshet **Keshet ***Telad

Top Programmes Channel by Channel

CHANNEL 1							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
MABAT DAILY NEWS-SPECIAL	Israel	News	5	19:30	109	10.3%	29.0%
FRIDAY ON THE TAVERN	Israel	Talk Show	42	21:03	72	9.4%	29.0%
MABAT DAILY NEWS	Israel	News	242	21:00	32	9.2%	27.0%
YOMAN-FRIDAY NEWS	Israel	News	49	20:00	60	8.4%	29.0%
POLITICA	Israel	Magazine	42	21:33	75	7.4%	22.0%
FRIDAY ON THE TAVERN-RERUN	Israel	Talk Show	5	21:00	76	6.7%	27.0%
ONE ON ONE-LIVE	Israel	Debates	33	21:35	31	6.7%	19.0%
AROUND THE WORLD	Israel	News	50	19:59	58	6.5%	20.0%
KLAF HAZAK-RERUN	Israel	Game Show	4	20:29	28	5.8%	17.0%
AT MENI'S-LIVE	Israel	Talk Show	69	20:21	39	5.6%	17.0%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
GRAND PRIX EURO. DE LA CHAN. 99		Variety Show	29/05	22:00	196	31.9%	73.0%
FBAL SPAIN-ISRAEL	Israel	Sport	10/10	19:30	122	13.9%	42.0%
ELECTIONS 1999	Israel	News	17/05	21:38	194	13.6%	46.0%
SPECIAL BROADCAST-ECLIPSE	Israel	Reality Show	11/08	14:00	58	13.2%	62.0%
TAVERN-SPECIAL FOR ELECT. DAY	Israel	Talk Show	17/05	20:30	63	12.8%	32.0%
TWELVE POINTS	Israel	Music	29/05	20:20	85	12.1%	38.0%
MABAT DAILY NEWS-SPECIAL-DERIE	Israel	News	17/03	20:00	97	12.0%	31.0%
SPEC. BROADC.-SATISFY O.T. GOVERN.	Israel	News	06/07	21:35	78	11.8%	39.0%
BBAL MACABI TEL-AVIV-TAUE SPAIN	Israel	Sport	04/02	20:45	113	11.7%	28.0%
BBAL MACABI TEL-AVIV-BOLONIA	Israel	Sport	04/03	20:34	116	11.0%	29.0%

Source: Tele-gal, People-meter reports

CHANNEL 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
THE FIRST IN ENTERTAINMENT	Israel	Talk Show	28	20:30	90	15.4%	41.0%
SHEMESH	Israel	Sitcom	24	21:05	35	14.5%	37.0%
POTCHIM SHAVUA	Israel	Talk Show	23	21:01	95	13.9%	37.0%
RAFI RESHEF	Israel	Talk Show	28	21:30	73	13.4%	38.0%
TO BE INVESTIGATED-PART 1	Israel	Series-Crime	5	20:31	63	13.3%	38.0%
WHO WANT'S TO BE A MILLIONAIR	Israel	Game Show	7	20:30	43	13.1%	38.0%
BLOOPERS	Israel	Comedy Show	17	20:30	58	13.0%	35.0%
UVDA	Israel	Series-General	29	20:30	52	12.8%	36.0%
MISHAL HAM	Israel	Magazine	31	22:01	78	12.6%	36.0%
HAHARZUFIM	Israel	Comedy Show	23	20:30	29	12.6%	36.0%
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
MISS ISRAEL 1999	Israel	Variety Show	09/03	20:30	127	21.9%	52.0%
FBAL ISRAEL-DENMARK		Sport	13/11	20:00	141	19.3%	48.0%
BLOOPERS-SPECIAL FINAL	Israel	Comedy Show	23/03	20:31	91	19.3%	48.0%
FBAL HPOEL HAIFA-MACABI HAIFA		Sport	06/02	17:05	136	19.3%	49.0%
KUSHNIR STANDUP II	Israel	Comedy Show	21/04	20:38	52	19.3%	38.0%
MISS UNIVERSE 1999	USA	Variety Show	27/05	21:30	127	19.3%	49.0%
WHEN THVIKA MET HANA-RERUN	Israel	Comedy Show	01/04	20:30	72	19.3%	38.0%
NEWS 2-ENTERING 2000	Israel	News	31/12	23:56	22	19.3%	38.0%
CHAIN REACTION	USA	Movie	09/01	21:41	124	19.3%	38.0%
BRAVO-SPECIAL FINAL	Israel	Children	15/08	21:05	101	19.3%	38.0%

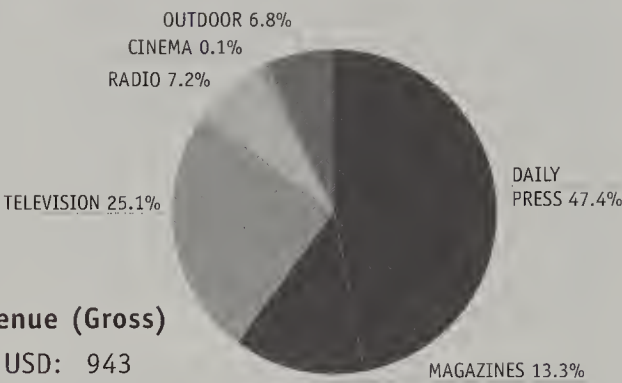
Source: Tele-gal, People-meter reports

Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million USD)	943
Total adspend (in million EUR)	932
TV adspend (in million USD)	237
TV adspend (in million EUR)	234
TV adspend in % of GDP	0.34
TV adspend per capita (USD)	39.2

Source: Israel Advertising Association. Numbers reflect 1998

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue (Gross)

in million USD: 943

in million EUR: 932

Source: Israel Advertising Association. Numbers reflect 1998

Japan

In Japan, the number of television channels that people receive varies regionally from 2 to 7. The average is 5 – the public channels are receivable everywhere. The average viewing time in 1999 was 3 hr 35 min and two thirds of this figure was a result of watching commercial television. What is interesting is how extreme the viewing figures vary from day to day and age group to age group: on Sundays, the average viewing time was 4 hr 3 min and elderly people of 60+ were registered as watching 5 hours a day. Although the average time spent watching television has increased in Japan in the last two years, it is felt that this is more due to people staying at home because of the recession than to the influence and popularity of television.

It is also interesting to note how the share of the channels changes throughout the day: early morning television between 6–9 am. belongs mainly to NHK, they broadcast a serial drama between 8–8:30 a.m. which is hugely popular. Private channels, however, are far more popular in the evening during prime time.

Digital broadcasting will begin in 2003 in Tokyo, Osaka and Nagoya and will begin nationally in 2006. It is planned that analogue broadcasting will be at an end by 2010. This change will not be as easy as was first estimated. Approximately 10 million households will have to change both antenna and channel settings to convert from analogue to digital. As the original estimates were much lower, this has come as a bit of a shock to those in charge. Discussions are now underway as to who is responsible for the costs which will occur. The subject continues...

SkyPerfecTV digital is already broadcasting and since March 2000 has merged with the smaller DirecTV. The latter was Sky's only strong foreign competitor in Japan which now means that Sky really does have the monopoly. As it also has the backing of media giants such as Murdoch, Fuji TV and Sony, the company is not likely to flop. As is the case with many successful channels, Sky held the rights to soccer games, namely those of the Italian premiere league. These games are popular in Japan as there are Japanese players in two of the premiere teams.

Digital broadcastign by BS satellite is due to get underway in December 2000. The Ministry of Posts and Telecommunications aims to attract 10 million viewing households within the first 1000 days of broadcasting. They are supporting this through demonstrations of what digital broadcasting will bring and by giving out information brochures.

In 1999, the Basic Broadcasting Propagation Plan was finally completed. This plan forms the basis for the founding of all new broadcasting stations. One of the aims set out in the plan is that all people, whether in urban or rural areas, should be able to receive both NHK as well as the commercial channels.

Last year also saw the revival of a much discussed topic: the V-Chip. The idea of the V-Chip is not new and has long been debated not only in Japan but also in many other countries. In the USA it has now been decided that all new television sets with a screen larger than 13 inches will have a V-Chip built in from the year 2000. This set off the debate again in Japan. It seems that the sides are very decided. There are those who say parents should determine what their children may or may not watch and that there is no real proof that delinquency stems from violence in television. On the other hand, there are those who say what about those parents who work and leave their children in the hands of daycare centres – in this situation it is not possible to control what is watched. Naturally, the topics of censorship and who has the right to decide what is censored also come into this debate and it seems that there is still no solution in sight.

With regards to the "Tops", it is interesting to note that in the top 10 movies for 1999, only two were US blockbusters. The other eight were all Japanese in origin. The top 20 programmes continue this picture, with not a single foreign production appearing in the list. This is in stark contrast to the analysed European countries where, although local production is becoming ever more popular, US films/series still play an important part.

The press took the largest share of advertising expenditure in Japan with a total of 43.7%. Television was the only other medium which even came near to this with a share of 33.5%. Surprisingly, the category which spent the most on advertising was food with 292 770 million yen spent in television. Other well presented categories included cosmetics and toiletries and drinks.

Japan

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General Data

COUNTRY	
Land area (km²)	377 837
Total population	126 480 000*
Number of households	43 900 000**
Average household size	2.9
In % of households/population equipped	
Phone	96.0/n.a.
Mobile telephone subscribers	n.a./41.0
PC's	30.0*/n.a.
Internet access	11.0*/n.a.
Internet users	n.a./14.4***

ECONOMICS	
GDP in billion JPY (at current prices)	497 256*
GDP per capita in JPY (at current prices)	3 900 000
Inflation rate in 1999 (in %)	0.6*
Value of JPY in Euro (EUR)****	1 EUR = 102.7 JPY
Value of JPY in US-Dollar (USD)****	1 USD = 102.3 JPY

Sources: Management and Coordination Agency, Ministry of Posts and Telecommunications, Bank of Japan *1998 **1995 ***NuaLtd ****end of 1999

TV OVERVIEW	
Total number of TV households (TVHH)	43 461 000*
In % of all households	99.0
Numbers of channels received by 70% of the population	n.a.
TV License-Fee cost per year	JPY 16 740.-/EUR 127.-

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.0
Multiset (homes with more than 1 TV set)	78.0
VCR	92.0
Teletext	11.0
Remote control	n.a.

Source: NHK nationwide Survey *data from 1995 **data from 1997

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	90.0
	connected	10.0
Satellite	private dish/DTH	22.0**
	collective dish/SMATV	6.0
Terrestrial	analog	100.0
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	2 350 000	Digital TV subscribers	2 064 000

Sources: NHK Broadcasting Culture Research Institute, Ministry of Post and Telecommunications, JSB

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)							
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue
NHK GENERAL TV	n.a.	T	100%	Japanese	168	Generalist	L-F
NHK EDUCATIONAL	n.a.	T	100%	Japanese	164	Education for children	L-F
NHK BS 1	1989	S	100%	Japanese	168	Generalist	L-F
NHK BS 2	1989	S	100%	Japanese	168	Generalist	L-F

Source: NHK Broadcasting Culture Research Institut

DOMESTIC CHANNELS (REGIONAL PRIVATE)*							
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue
NTV	n.a.	T	31%	Japanese	168	Generalist	Adv.
TBS	n.a.	T	31%	Japanese	168	Generalist	Adv.
Fuji TV (CX)	n.a.	T	31%	Japanese	168	Generalist	Adv.
TV Asahi (ANB)	n.a.	T	31%	Japanese	168	Generalist	Adv.
TV Tokyo (TX)	n.a.	T	31%	Japanese	168	Generalist	Adv.

Source: NHK Broadcasting Culture Research Institut

*in Tokyo Area only

INTERNATIONAL CHANNELS						
Channels	Nature	Diffusion	Language	Programming	Revenue	
CMT	n.a.	S	English/sub.	Music	Adv.	
CNN Int.	Private	S	English	News	Adv.	
MTV ASIA	Private	S	English/sub.	Music	Adv.	
TNT/CARTOON	Private	S	English	Old Movies/Children	Adv.	
DISCOVERY	Private	S	English	Documentary	Adv.	
NBC ASIA	Private	S	English/sub.	Generalist	Adv.	
HISTORY	Private	S	English	Documentary	Adv.	
TRAVEL	Private	S	English	Travel	Adv.	
BBC WORLD	Private	S	English	News	Adv.	

Source: NHK Broadcasting Culture Research Institut

PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscr.	Language	h/week	Programming	Cost/month	Revenue
SB	1991	S	2 535 000	Japanese	168	Movie, Sport, Music	n.a.	Sub.

Source: SB

DIGITAL PACKAGES							
Channels	Launch	Diff.	Decoder	Subscr.	Language	No. of ch.	Revenue
SKY PerfecTV	July 1998	S	n.a.	1 663 800	Japanese	167	Sub.
DirecTV*	Dec. 1997	S	n.a.	401 100	Japanese	135	Sub.

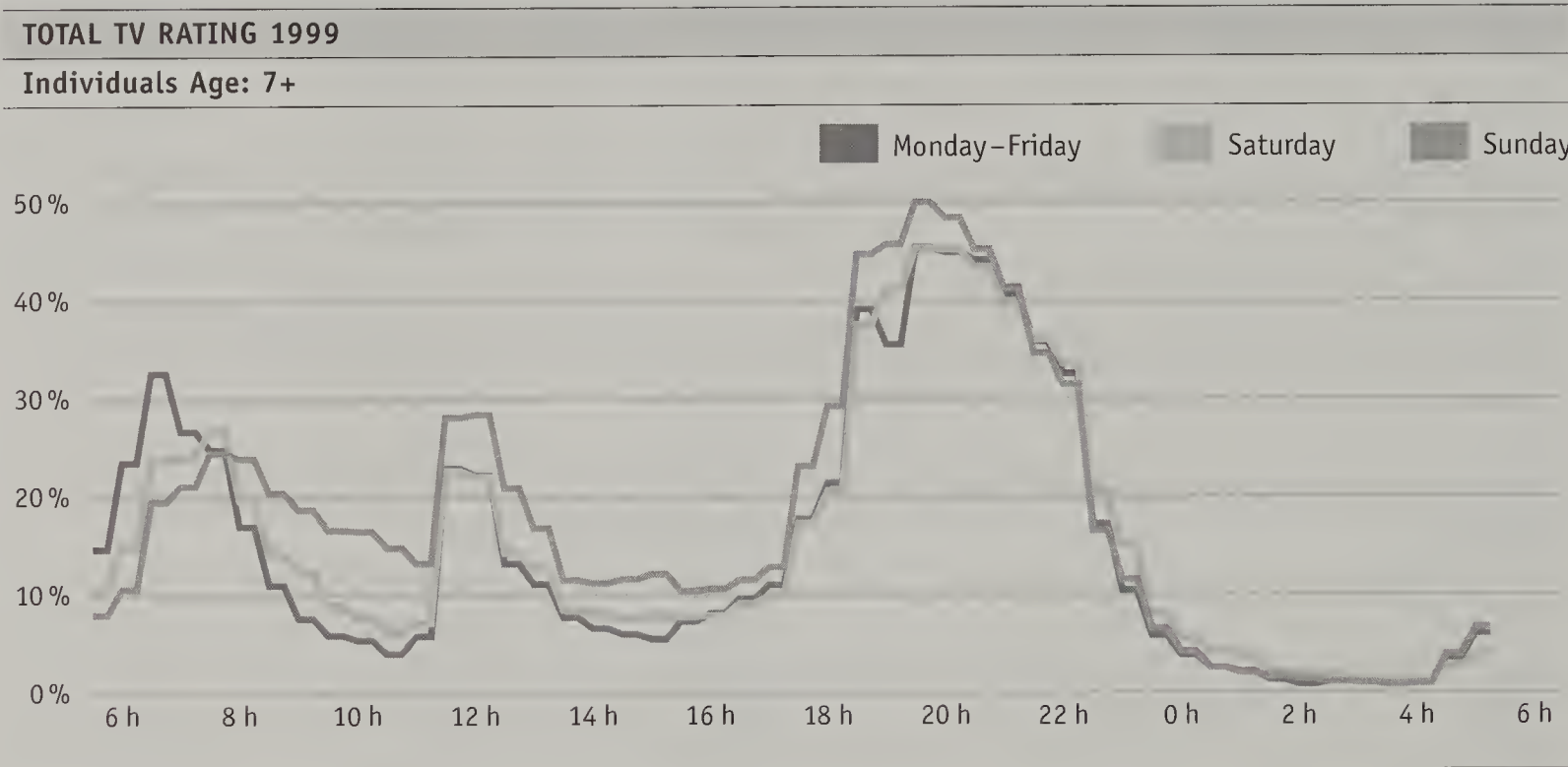
Source: NHK Broadcasting Culture Research Institut

*DirecTV ist going to go out of business in this year. The subscribers are to be moved to SKY PerfecTV by december 2000.

Viewing Patterns

AUDIENCE MEASUREMENT		
Name of the Service and Institute:	NHK (Japan Broadcasting Corporation) Broadcasting Culture Research Institute	
Panel/Sampling Size	3 600 individuals	
Instrument used (people-meter, telefon, face-to-face)	diary	
	Population size in 000	
Individuals 7+	117 074	
Adults 20+	97 000	
Children 7–12	8 476	

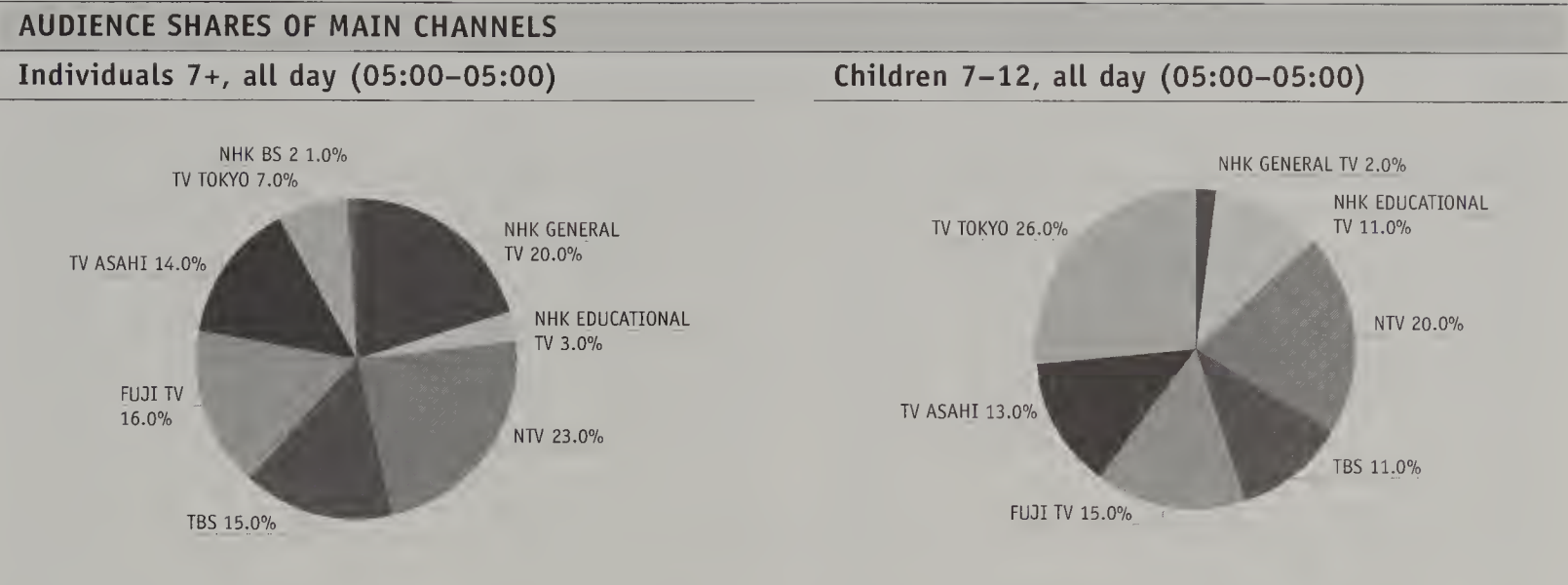
Source: NHK Nationwide Survey



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)									
	Individuals 7+			Children 7–9			Children 10–12		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	96.0	97.0	96.0	97.0	98.0	95.0	97.0	98.0	99.0
Viewing time per Individual	214	222	215	127	127	113	134	144	137

Source: NHK Nationwide Survey

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 05:00 – 05:00				
	Individuals 7+		Children 7–12	
	1998	1999	1998	1999
NHK GENERAL TV	22%	20%	4%	2%
NHK EDUCATIONAL TV	3%	3%	11%	11%
NTV	23%	23%	18%	20%
TBS	15%	15%	8%	11%
FUJI TV	16%	16%	18%	15%
TV ASAHI	13%	14%	13%	13%
TV TOKYO	7%	7%	25%	26%
NHK BS 2	1%	1%	0%	0%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS				
	Individuals 7+		Children 7–12	
	Day Time Prime Time		Day Time Prime Time	
	5–18 h	18–24 h	5–18 h	18–24 h
NHK GENERAL TV	25%	17%	4%	4%
NHK EDUCATIONAL TV	4%	2%	20%	8%
NTV	24%	21%	13%	20%
TBS	11%	19%	4%	10%
FUJI TV	17%	17%	20%	19%
TV ASAHI	12%	15%	1%	18%
TV TOKKYO	5%	8%	24%	8%
NHK BS 2	1%	1%	0%	0%

Source: NHK nationwide survey; June 1999

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
DAI 50 KAI NHK KOUHAKU UTAG. PART	Japan	NHK	Music	19:30	31/12	33.4%	56.5%
PRINCES MONONOKE	Japan	NTV	Movie	21:03	22.01	19.2%	45.0%
SHINSYUN DRAMA SPECIAL*	Japan	CX	Series–Crime	21:03	03/01	18.1%	40.4%
SMAP X SMAP	Japan	CX	Variety Show	22:00	12/07	17.6%	40.5%
GENROKU RYORAN	Japan	NHK	Series–General	20:00	28/11	17.4%	31.3%
BASEB KYOJIN–CHUNICHI		NTV	Sport	19:00	01/09	17.1%	35.7%
„WATARU SEKEN HA ONI BAKARI“ SPEC.	Japan	TBS	Series –Family	21:00	25/03	16.3%	34.9%
SUZURAN	Japan	NHK	Series–Daily Soap	08:15	17/09	16.2%	46.2%
BASEB 99 ALL STAR GAME		ANB	Sport	18:34	24/07	15.9%	37.6%
EKIDEN ROAD RELAY/SECOND HALF		NTV	Sport	07:45	03/01	15.8%	49.2%
EKIDEN ROAD RELAY/FIRST HALF		NTV	Sport	07:45	02/01	15.3%	48.4%
UTSU-CHAN NAN–CHAN URINARI!	Japan	NTV	Variety Show	19:58	15/01	15.2%	31.3%
BASEB KYOJIN–HANSHIN		NTV	Sport	19:00	20/06	15.2%	30.0%
SUMO FINAL		NHK	Sport	15:15	24/01	15.1%	41.0%
SANMA NO KARAKURI TV TOKUDAIGOU!	Japan	n.a.	Variety Show	19:00	28/03	15.1%	31.5%
KAIKYOKU 40 SYUNEN TOKUBETU**	Japan	ANB	Series–General	21:00	20/03	15.0%	32.3%
BASEB KYOJIN–HANSHIN		NTV	Sport	19:00	04/04	15.0%	29.5%
HEY! HEY! HEY!	Japan	CX	Music	20:00	21/06	14.9%	32.1%
BASEB CHUNICHI–DAIE		TBS	Sport	18:00	28/10	14.9%	33.2%
FURUHATA NINZABURO	Japan	CX	Series–Crime	21:30	11/05	14.8%	32.9%

Source: iNEX by VIDEO RESEARCH Ltd.

*"FURUHATA NINZABURO VS SMAP" , **KIKAKU "KYOUDAI"

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
PRINCES MONONOKE	Japan	NTV	21:03	22/01	19.2%	45.0%
INDEPENDENCE DAY	USA	ANB	21:00	10/10	12.0%	30.3%
MINBOO NO ONNA	Japan	CX	21:00	08/05	11.9%	28.7%
TSURI BAKA NITSUSHI 10	Japan	TBS	21:01	06/09	11.1%	25.5%
MEITANTEI KONAN*	Japan	NTV	19:00	22/03	9.8%	24.1%
DORAEMON „NOBITA NO NANKAI DAIB.“	Japan	ANB	19:00	10/01	8.0%	20.7%
SUNA NO UTSUWA	Japan	TX	21:02	26/08	7.7%	20.1%
GKUDOU NO TSUMATACHI „AKAI SATSUI“	Japan	TBS	21:00	27/09	7.6%	17.1%
HATTSUKOUSASAN	Japan	NHK	10:10	15/01	6.3%	25.8%
THE TARGET	USA	TBS	21:00	29/03	6.0%	14.3%

Source: iNEX by VIDEO RESEARCH Ltd.

*"14 BANME NO HYOTEKI TARGET"

TOP 10 SPORT EVENTS					
Title	Channel	Start. Time	Date	Audience	Share
BASEB KYOJIN–CHUNICHI	NTV	19:00	01/09	17.1%	35.7%
BASEB ALL STAR GAME	ANB	18:34	24/07	15.9%	36.4%
EKIDEN ROAD RELAY/SECOND HALF	NTV	07:45	03/01	15.8%	49.2%
EKIDEN ROAD RELAY/FIRST HALF	NTV	07:45	02/01	15.3%	48.4%
BASEB KYOJIN–HANSHIN	NTV	19:00	20/06	15.2%	30.0%
SUMO FINAL	NHK	15:15	24/01	15.1%	41.0%
BASEB KYOJIN–HANSHIN	NTV	19:00	04/04	15.0%	29.5%
BASEB CHUNISHI–DAIE	TBS	18:00	28/10	14.9%	33.2%
BASEB HANSHIN–KYOJIN	NTV	19:00	12/06	14.8%	34.3%
BASEB CHUNICHI–KYOJIN	CX	19:04	16/09	14.7%	30.7%

Source: iNEX by VIDEO RESEARCH Ltd.

Top Programmes Channel by Channel

NHK							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
SUZURAN	Japan	Series–Daily Soap	156	08:15	15	13.7%	43.2%
ASUKA	Japan	Series–Daily Soap	61	08:15	15	12.9%	41.8%
GENROKU RYOURAN	Japan	Series–General	49	20:00	45	12.0%	22.9%
YANCYA KURE	Japan	Series–Daily Soap	78	08:15	15	11.9%	39.2%
NHK KAYO CONCERT	Japan	Music	45	20:00	45	9.7%	20.3%
TAMESHITE GATTEN	Japan	Game Show	46	20:00	45	9.1%	20.0%
QUIZ NIHONJIN NO SITSUMON	Japan	Game Show	48	19:20	40	8.3%	17.8%
SYUTOKEN NEWS 845	Japan	News	223	20:45	15	8.1%	17.8%
NEWS WEATHER INFORMATION	Japan	News	111	20:45	15	8.0%	16.6%
COMEDY OEDO DE GOZARU	Japan	Comedy Show	45	20:00	45	8.0%	17.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
DAI 50 KAI NHK KOUH. UTA GAS.	Japan	Music	31/12	19:30	245	35.1%	56.5%
SUMO THE 12TH DAY	Japan	Sport	21/01	17:44	17	15.7%	42.8%
SUMO FINAL	Japan	Sport	24/01	15:15	165	15.1%	41.0%
DAI 31 KAI OMOIDE NO MEMORY	Japan	Music	14/08	19:30	120	14.0%	28.7%
BASEB FINAL	Japan	Sport	21/08	13:00	215	12.7%	49.5%
SUMO THE 12TH DAY	Japan	Sport	19/01	17:05	55	12.5%	42.4%
AMURO NAMIE 21 SAI NO CHOUSEN	Japan	Documentary	15/01	21:00	60	12.2%	24.2%
YUKUTOSHI KURUTOSHI	Japan	Reality Show	31/12	23:45	80	12.2%	28.2%
KOUHAKU 50 KAI	Japan	Music	26/12	19:20	75	11.8%	22.4%
KAYO CHARITY CONCERT	Japan	Music	04/05	19:30	75	11.6%	23.6%

Source: iNEX by VIDEO RESEARCH Ltd.

NTV							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
DENPA SYONEN	Japan	Variety Show	50	22:30	25	10.8%	30.7%
SEKAI MARU MIE! TV TOKUSOUBU	Japan	Variety Show	46	20:00	54	10.0%	23.5%
TOKUMEI RESEARCH 200X!	Japan	Documentary	34	19:58	56	9.9%	20.7%
ODORU! SANMA GOTEN!	Japan	Variety Show	35	19:58	56	9.8%	22.1%
SOKUHO! UTA NO DAIJITEN!	Japan	Music	31	19:58	56	9.5%	23.3%
ITO-KE NO SYOKUTAKU	Japan	Variety Show	33	19:00	58	9.5%	25.8%
KAYO SUSPENSE GEKIJYOU	Japan	Series-Mysterious	47	21:03	111	9.3%	22.4%
AA! BARAIRO NO CHINSEI!	Japan	Variety Show	35	19:00	54	8.9%	23.3%
ICHIOKUNIN NO DAI SHITUMON!?*	Japan	Variety Show	35	19:00	58	8.8%	22.6%
OSYARE KANKEI!	Japan	Talk Show	48	22:00	30	8.8%	23.2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
PRINCES MONONOKE	Japan	Movie	22/01	21:03	161	19.2%	45.0%
BASEB KYOJIN–CHUNICHI		Sport	01/09	19:00	144	17.1%	35.7%
EKIDEN ROAD RELAY/SECOND HALF		Sport	03/01	07:45	395	15.8%	49.2%
EKIDEN ROAD RELAY/FIRST HALF		Sport	02/01	07:45	380	15.3%	48.4%
BASEB KYOJIN–HANSHIN		Sport	20/06	19:00	144	15.2%	30.0%
BASEB KYOJIN–HANSHIN		Sport	04/04	19:00	214	15.0%	29.5%
BASEB HANSHIN–KYOJIN		Sport	12/06	19:00	144	14.8%	34.3%
DENPA SYONEN HADAKA MATSURI	Japan	Variety Show	28/03	21:00	114	14.7%	27.1%
DENPA SYONEN AKEMASHITE**	Japan	Variety Show	01/01	21:30	124	14.6%	33.6%
BASEB KYOJIN–YAKURUTO		Sport	29/04	19:00	144	14.6%	28.7%

Source: iNEX by VIDEO RESEARCH Ltd.

*WARATTSUTE KORAETE!, **OMEDETO MATSURI

TBS							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
WATARU SEKEN HA ONI BAKARI	Japan	Series-Family	38	21:00	54	13.8%	29.3%
SANMA NO KARAKULI TV	Japan	Variety Show	43	19:00	60	11.0%	23.1%
SALARY MAN KINTARO	Japan	Series-Family	11	21:00	54	11.0%	22.1%
MAJYO NO JYOUKEN	Japan	Series-General	11	22:00	54	10.3%	27.2%
BROAD CASTER	Japan	News	46	22:00	84	9.6%	24.8%
MITO KOUMON	Japan	Series-General	30	20:00	54	8.7%	17.8%
SEK. HIR. NO TOKYO FRIEND PARK 2	Japan	Game Show	51	19:00	54	8.3%	20.1%
3 NEN B GUMI KINPACHI SENSEI	Japan	Series-General	10	21:00	54	8.0%	20.0%
UTSUKUSII HITO	Japan	Series-General	10	22:00	54	8.0%	22.5%
GETSUYO DRAMA SPECIAL	Japan	Series-General	41	21:02	112	7.9%	19.0%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
WATARUSEKEN HA ONIB./SPECIAL	Japan	Series-Family	25/03	21:00	114	16.3%	34.9%
SANMA NO KA. TV CYO TOKUDAIGOU!	Japan	Variety Show	28/03	19:00	114	15.1%	31.5%
BASEB CHUNICHI-DAIE	Japan	Sport	28/10	18:00	234	14.9%	33.2%
SOUZ. KIN. BATTLE! SP. MAN NO.1	Japan	Sport	01/01	18:00	204	13.5%	27.3%
BASEB CHUNICHI-KYOJIN	Japan	Sport	14/09	19:04	120	13.1%	28.6%
WATARUSEKEN HA ONI./NEN. SPEC.	Japan	Series-Family	23/12	21:00	114	12.9%	28.2%
BASEB HANSHIN-KYHOJIN	Japan	Sport	11/06	19:04	140	12.8%	29.4%
BASEB YOKOTAMA-KYOJIN	Japan	Sport	13/08	19:04	140	12.8%	28.9%
BASEB CHUNICHI-KYOJIN	Japan	Sport	02/06	19:04	140	12.2%	26.4%
GETSUYO DRAMA SPECIAL	Japan	Series-Crime	05/07	21:00	114	11.2%	24.2%

Source: iNEX by VIDEO RESEARCH Ltd.

CX							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
FURUHATA NINZABURO	Japan	Series-Crime	11	21:00	54	12.9%	29.2%
SMAP X SMAP	Japan	Variety Show	45	22:00	54	12.0%	31.6%
SAZAE SAN	Japan	Cartoon	49	18:30	30	10.8%	33.9%
KYUMEI BYOUTOU 24 JI	Japan	Series-General	12	21:00	54	10.7%	23.4%
AISURU FUTARI WAKARERU FUTARI	Japan	Debates	42	19:00	54	10.3%	26.7%
RING	Japan	Series-Mysterious	12	22:00	54	9.8%	25.3%
OVER TIME	Japan	Series-General	12	21:00	54	9.7%	23.7%
KOORI NO SEKAI	Japan	Series-Mysterious	11	21:00	54	9.4%	23.0%
HATTSUKUTSU ! ARUARU DAIJITEN	Japan	Variety Show	51	21:00	54	9.2%	20.1%
KINYO ENTERTAINMENT	Japan	Series-General	48	21:00	112	8.7%	21.9%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FURUHATA NINZABURO VS SMAP	Japan	Series-Crime	03/01	21:03	157	18.1%	40.4%
BASEB CHUNICHI-KYOJIN	Japan	Sport	16/09	19:04	140	14.7%	30.7%
BASEB CHUNICHI-KYOJIN	Japan	Sport	17/08	19:04	140	13.7%	27.7%
FURUHATA NINZABURO SPECIAL	Japan	Series-Crime	06/04	21:00	134	13.4%	32.8%
SMAP X SMAP '99 M. NO S1	Japan	Variety Show	02/08	22:00	69	13.3%	37.5%
WARATTSUTE IITOMO TOSH. TOK.!	Japan	Variety Show	29/12	20:00	204	13.2%	33.3%
TUNNELS NO MINASAMA/TOK. SPEC.	Japan	Variety Show	01/04	21:00	128	13.0%	32.4%
BASEB CHUNICHI-DAIE	Japan	Sport	27/10	18:20	204	12.8%	26.9%
KYUMEI BYOUTOU 24JI FINAL	Japan	Series-General	23/03	21:02	106	12.6%	27.6%
GTO DRAMA SPECIAL	Japan	Series-General	29/06	21:00	108	12.6%	33.3%

Source: iNEX by VIDEO RESEARCH Ltd.

ANB							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
HAGURE KEIJI JYUNNYOU HA	Japan	Series-Crime	27	20:00	54	9.9%	22.0%
HAMIDASHI DEKA JYOUNETU KEI	Japan	Series-Crime	23	21:00	54	9.2%	21.1%
DOYO WIDE GEKIJYO	Japan	Ser.-Myster.	50	21:00	111	8.1%	19.3%
NICHIYO YUGA GEKIJYO	USA	Movie	51	21:02	112	7.7%	19.0%
KOI NO KISEKI	Japan	Series-General	12	21:00	54	7.4%	17.4%
NEWS STATION	Japan	News	254	22:00	80	6.5%	18.3%
MOKUGEKI DOKYUN!	Japan	Variety Show	46	19:00	60	6.5%	18.0%
TAKESHI NO TV TACKLE!	Japan	Variety Show	46	21:00	54	6.4%	14.8%
MUSIC STATION	Japan	Music	45	20:00	54	5.8%	15.9%
SHINKON SAN IRATTSUSYAI!	Japan	Talk Show	50	12:55	30	5.5%	19.3%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
BASEB ALL STAR GAME	Japan	Sport	24/07	18:34	195	15.9%	37.6%
KAIKYOKU 40 SYU-NEN /KYODAI	Japan	Series-General	20/03	21:00	141	15.0%	32.3%
BASEB HANSHIN-KYOJIN	Japan	Sport	05/05	19:03	136	14.5%	29.1%
BASEB ALL STAR GAME	Japan	Sport	25/07	18:34	165	13.6%	31.2%
BASEB HANSHIN- KYOJIN	Japan	Sport	12/09	18:35	159	13.6%	27.4%
INDEPENDENCE DAY	USA	Movie	10/10	21:00	159	12.0%	30.0%
HAMIDASHI KEIJI JYOUNET. SPEC.	Japan	Series-Crime	13/10	21:00	84	11.7%	26.9%
DOYO WIDE GEKIJYO/KAS. HA MITA	Japan	Ser.-Myster.	06/02	21:00	141	11.6%	27.8%
BASEB YAKURUTO-KYOJIN	Japan	Sport	04/09	18:35	169	10.7%	25.7%
BASEB SEIBU-KYOJIN	Japan	Sport	20/03	13:00	175	9.9%	34.7%

Source: iNEX by VIDEO RESEARCH Ltd.

TX							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
KAIUN! NANDEMO KANTEIDAN	Japan	Variety Show	51	21:00	54	7.9%	16.9%
AI NO BINBO DASYUTU DAISAK.	Japan	Variety Show	51	21:00	54	6.3%	14.0%
SYUTU BOTSU! AD MACHITTS. TEN.	Japan	Variety Show	49	21:00	54	5.6%	12.4%
ASAYAN	Japan	Variety Show	51	21:00	54	5.1%	13.5%
TV CHAMPION	Japan	Variety Show	52	19:30	54	5.0%	14.0%
DOYO SPECIAL	Japan	Variety Show	48	19:00	114	4.9%	11.5%
MOKUYO YOGA GEKIJYO	Japan	Movie	48	21:02	112	4.7%	11.8%
TOKUMITSU KAZ. NO JYOH0 SPRITS	Japan	Variety Show	43	19:50	64	4.6%	10.8%
QUIZ AKATTSUPAJI AOTTSUPAJI	Japan	Game Show	49	21:30	54	4.5%	10.3%
QUIZ TOKOROKAWAREB!?	Japan	Game Show	41	20:00	54	4.4%	10.4%

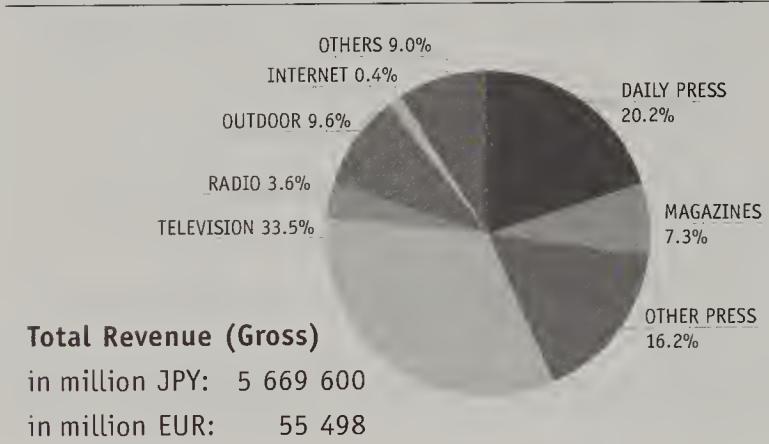
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
KAIKYOKU 35 SYUNEN/TSUN. NITE	Japan	Series-General	04/11	21:00	144	8.5%	21.7%
MOKUYO YUGA/SUNA NO UTSUWA	Japan	Movie	26/08	21:02	167	7.7%	20.1%
DOYO SPECIAL/IROEI NO ARU MEI.	Japan	Variety Show	06/02	19:00	114	7.1%	11.5%
NIHON BIG SPECIAL/DARENIMO	Japan	Variety Show	10/01	19:00	114	6.3%	12.5%
KAIKYOKU 35 SYU-NEN/TOK. KAZUO	Japan	Music	29/03	19:00	204	6.1%	13.1%
NATSU MATSURI NIPPON NO UTA	Japan	Music	09/07	19:00	169	6.1%	14.6%
SIJYO SAIK. NO RA-MEN & SUSHI R.	Japan	Variety Show	02/04	21:00	108	6.0%	10.1%
DAI 22 KAI SUMIDAGAWA	Japan	Reality Show	31/07	19:00	114	6.0%	17.0%
KAIKYOKU 35 SYU-NEN/KINEN BA.	Japan	Documentary	09/09	21:00	144	5.6%	13.7%
BASEB NIHON HUM-KYOJIN	Japan	Sport	21/03	13:00	145	5.4%	20.3%

Source: iNEX by VIDEO RESEARCH Ltd.

Advertising Expenditure

ADVERTISING FIGURES	GROSS	NET
Total adspend (in million JPY)	5 699 600	4 844 660
Total adspend (in million USD)	55 715	47 357
Total adspend (in million EUR)	55 498	47 560
TV adspend (in million JPY)	1 912 100	1 625 285
TV adspend (in million USD)	18 691	15 887
TV adspend (in million EUR)	18 618	15 825
TV adspend in % of GDP	0.38	0.33
TV adspend per capita (USD)	147.7	125.6

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

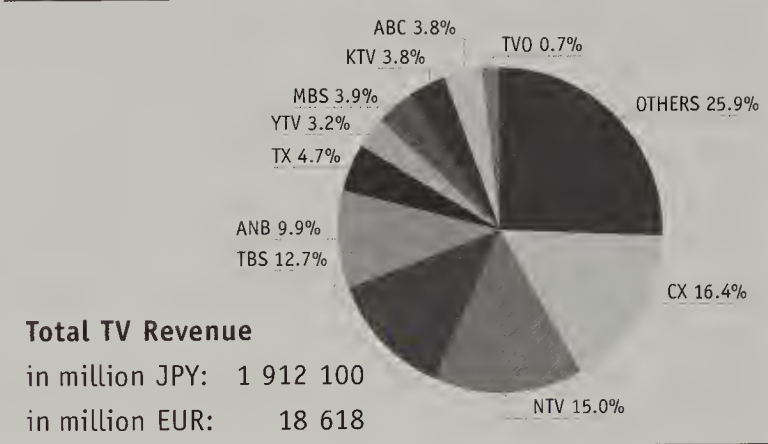


Sources: '99 Nihon no Koukokuhi by Dentsu

TV ADVERTISING STATISTICS	
Total number of spots broadcast	845 481*
Average spot length (in sec.)	17.8
Total number of advertisers	n.a.
Number of TV advertisers	2 037
Total number of advertised products	n.a.
Number products advertised on TV	3 045 785**

Sources: '99 Nihon no Koukokuhi by Dentsu,Video Research "iNEX", Population statistics by general affaire agency taken on Oct. '99
*1998 (Dentsu Institut; Japan 2000 Marketing & Advertising Yearbook),
**1997 (Dentsu Institut; Japan 1999 Marketing & Advertising Yearbook)

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



Source: Weekly, Kigyo to Koukokuhi on 5 May

TOP 10 ADVERTISING FIGURES (GROSS)				
TV Advertising Sectors	3 Media*	Television	Spent in TV	Share of TV Expenditure
FOODS	369 690	292 770	79.2%	15.3%
COSMETICS/TOILETRY	346 480	256 880	74.1%	13.4%
DRINKS (NON ESSENTIAL LUXURY)	314 150	223 200	71.0%	11.7%
MEDICINES/MEDICAL TREATMENT/CARE GOODS	192 970	140 070	72.6%	7.3%
INFORMATION/COMMUNICATION	247 940	128 330	51.8%	6.7%
DISTRIBUTION/RETAIL	259 580	124 200	47.8%	6.5%
CAR RELATED GOODS	253 750	120 980	47.7%	6.3%
HOBBIES/SPORTING GOODS	165 530	104 040	62.9%	5.4%
FINANCE/INSURANCE	207 640	79 460	38.3%	4.2%
TRAFFIC/LEISURE	277 830	77 440	27.9%	4.0%
OTHERS	1 052 640	364 730	34.6%	19.1%
TV Advertisers				
KAO	37 713	30 218	80.1%	1.6%
SUNTORY	51 096	29 722	58.2%	1.6%
HOUSE SYOKUHN	29 382	28 772	97.9%	1.5%
TOYOTA JIDOUSYA	52 273	15 879	30.4%	0.8%
KYOWA SHINYAKU	27 862	15 151	54.4%	0.8%
NIHON COCA COLA	16 790	13 997	83.4%	0.7%
EBARA SYOKUHN	11 868	11 634	98.0%	0.6%
LION	13 224	11 552	87.4%	0.6%
NIHON CHOKUHAN	5 138	5 138	100.0%	0.3%
PROCTER & GAMBLE	3 120	1 957	62.7%	0.1%
OTHER	3 439 734	1 748 081	50.8%	91.4%
Total (in million JPY)	3 688 200	1 912 100	51.8%	100.0%
Total (in million EUR)	35 912	18 618	51.8%	100.0%

Sources: '99 Nihon no Koukokuhi by Dentsu

*Press, TV, Radio

National TV market

In Mexico, although both private and public television exist, it is the private company Televisa which dominates the television landscape. The company was founded in 1973 by the merger of four TV channels into a joint-stock company and with these four channels, Televisa can reach up to 97% of all Mexican households, 24 hours a day. The second private company which operates all over Mexico, TV Azteca, came about in 1993 from the sale of the public channels 7 and 13 and also has a reach of 97%. It does not, however, reach Televisa’s market shares.

The two government-owned public channels, 11 and 22, can be received nationally only by cable or satellite, and in comparison with private TV their ratings are insignificant.

Cable TV grew remarkably within the last few years and at the beginning of 1999 there were 150 operators. The most important private companies are Cablevisión from Televisa and MVS Multivisión.

The increasing internationalisation of the TV markets resulted in new alliances. Televisa works together with News Corp., TV Globo and TCI to offer direct to home TV on the American continent under the name of Sky. Multivisión with Hughes, the Venezuelan Grupo Cisneros and the Brazilian Televisão Abril broadcasts DTH under the name Direct TV. Both services include 64 channels each.

Approximately 42% of Mexicans live in poverty or extreme poverty. Since terrestrial reception is free while cable and direct to home TV require subscription, these extra services can only be used by certain sectors of the population. Recently, just 17% of TV households had subscribed to pay TV, which meant 4% of the audience share.

Programming

The share of entertainment programmes on television is on average 65%, but on some channels this is as high as 95%. Televisa aims at distinguishing its different channels by certain programmes. Channel 2 specialises in shows and during prime time above all on home-produced soap operas (telenovelas). This channel also presents the company’s main news programme and sports. Channel 4 transmits mainly comedy programmes and series, whereas Channel 5 is responsible for entertaining the children with animated cartoons during the daytime. Later, it broadcasts films and series. Channel 9 offers principally films, sports and repeats of series. 90% of Channel 9’s programmes are produced in Mexico, while those of Channel 5 are nearly all of foreign production. TV Azteca’s Channel 7 focuses on a younger audience with films, comedies and animated cartoons. Its Channel 13 aims to compete with Televisa’s Channel 2 and offers above all telenovelas, other entertainment programmes and the company’s main news show.

Cablevisión and MVS offer both Mexican and foreign programmes over 59 channels; the foreign programmes are mostly from the USA. Both companies also offer a pay-per-view service.

With regard to the proportion of national and foreign programmes, it is stipulated by law that 30% of programmes have to be of national origin.

Advertising

Advertising activity in Mexican TV is reduced by law to 18% of the total programme time, and it is forbidden to broadcast more than 50% of advertising spots after 8 p.m. Depending on the programme, there may be up to ten interruptions per hour with a maximum duration of 90 seconds each. Products which because of their characteristics are deemed to be offensive or upset morals may not be advertised, and alcoholic beverages not at all before 10 p.m.

Product placement is allowed, and is widely practised, especially in the numerous daily telenovelas which are broadcast in Mexico.

Cable and direct to home TV are financed by subscriptions and commercials and the public channels by advertising and subsidies from public households. The private channels which can only be received by air are financed fully by advertising. Product placement makes up to 10% of the receipts.

A steady increase in the advertising tariffs – which always widely exceed the inflation rate – has been observed for many years now. For the year 2000, both Televisa and TV Azteca, demand 40% more which means that, for example, one minute during prime time in Televisa’s most important channel, Canal 2, can cost up to 480.000 Mexican Pesos (ca. 50 000 EURO).

Mexico

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General Data

COUNTRY	
Land area (km ²)	1 958 201
Total population	98 794 831
Number of households*	21 047 352
Average household size	4.7
In % of households equipped	
Phone**	50.0
Mobile telephone subscribers	8.7
PC's**	7.2
Internet access***	5.8
Internet user, last month	n.a.

Source: *Establishment Survey 1998 based on INEGI's data, **This data applies only for 27 cities in the Mexican Republic, *** Suplemento Reforma November 1998

ECONOMICS	
GDP in million MXN (at current prices)	4 149 000 ¹
GDP per capita in MXN (at current prices)	41 994
Inflation rate in 1999 (in %)	12.3
Value of MXN in Euro (EUR)	1 EUR = 9.51 MXN
Value of MXN in US-Dollar (USD)	1 USD = 9.47 MXN

Source: SHCP (Secretaria de Hacienda y Crédito Público) Gobierno de México
¹Banco de Mexico 1998

TV OVERVIEW	
Total number of TV households (TVHH)	20 205 457
In % of all households	96.0
Numbers of channels received by 70% of the population	4
TV License-Fee cost per year	n.a.

TV EQUIPMENT	
	in % of TVHH
Colour TV	90.1
Multiset (homes with more than 1 TV set)	52.6
VCR	45.8
Teletext	n.a.
Remote control	75.5

Sources: Establishment Survey 1998
*TV international 2000
**includes collective dish/SMATV

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	9.9*
Satellite	private dish/DTH	11.7**
	collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	2.0 [†]

TV SUBSCRIPTION			
Analog pay TV subscribers	17.2%	Digital TV subscribers	3.2%

Source: TV International 2000

TV Landscape

DOMESTIC CHANNELS (NATIONAL PRIVATE)							
Channels	Launch	Diffusion	Tech. Pen.	Language	h/week	Programming	Revenue
CHANNEL 2	1951	T, C	97%	Spanish	168	Generalist	Adv.
CHANNEL 5	1952	T, C	97%	Spanish	168	Generalist	Adv.
CHANNEL 7	1985	T, C	97%	Spanish	168	Generalist	Adv.
CHANNEL 13	1985	T, C	97%	Spanish	168	Generalist	Adv.

Source: Directory of media advertisers Ed. Dic. 1999

DOMESTIC CHANNELS (REGIONAL PUBLIC)							
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue
CHANNEL 11	1959	T, C	MAMC*, GDA, MTY	Spanish	168	Cultural	Gvt/Adv.
CHANNEL 22	1990	T, C	MAMC*, GDA, MTY	Spanish	133	Cultural	Gvt/Adv.
CHANNEL 34	1999	T	MAMC*	Spanish	133	Cultural	Gvt.
CHANNEL 7	1991	T, C	Guadalajara	Spanish	119	Cultural	Gvt.
CHANNEL 53	1990	T	Monterrey	Spanish	133	Cultural	Gvt.
CHANNEL 28	1982	T, C	Monterrey	Spanish	119	Cultural	Gvt.

Source: Directory of media advertisers Ed. Dic. 1999 *MAMC = Metropolitan Area Mexico City; GDA = Guadalajara; MTY = Monterrey

DOMESTIC CHANNELS (REGIONAL PRIVATE)							
Channels	Launch	Diffusion	Tech.Pen.	Language	h/week	Programming	Revenue
CHANNEL 4	1950	T, C	MACM*	Spanish	168	Generalist	Adv.
CHANNEL 9	1985	T, C	Semi-National	Spanish	168	Generalist	Adv.
CHANNEL 40	1994	T, C	MAMC*, GDA, MTY	Spanish	147	Generalist	Adv.
CHANNEL 4	1960	T, C	Guadalajara	Spanish	119	Generalist	Adv.
CHANNEL 5	1960	T	Guadalajara	Spanish	119	Generalist	Adv.
CHANNEL 12	1960	T, C	Monterrey	Spanish	140	Generalist	Adv.
CHANNEL 2	1958	T, C	Monterrey	Spanish	147	Generalist	Adv.
CHANNEL 34	1960	T	Monterrey	Spanish	133	Generalist	Adv.
CHANNEL 64	1986	T	Monterrey	Spanish	140	Generalist	Adv.

Source: Directory of media advertisers Ed. Dic. 1999 *MAMC = Metropolitan Area Mexico City; GDA = Guadalajara; MTY = Monterrey

INTERNATIONAL CHANNELS						
Channels	Nature	Diffusion	Tech.Pen.	Language	Programming	Revenue
ANIMAL PLANET	Private	C	MAMC	Spanish	Documentaries	Adv.
ANTENA 3	Private	S	MAMC	Spanish	Generalist	Adv.
TELE UNO	Private	C	MAMC	Spanish	Generalist	Adv.
CARTOON NETWORK	Private	C, S	MAMC	Spanish	Entertainment Kids	Adv.
CINE CANAL	Private	S	MAMC	English	Movies	Adv.
CINE CANAL 2 (este)	Private	S	MAMC	English	Movies	Adv.
CINEMAX	Private	S	MAMC	English	Movies	Adv.
CNN ESPAÑOL	Private	S	MAMC	Spanish	News	Adv.
CNN INTERNACIONAL	Private	C	MAMC	English	News	Adv.
DISCOVERY CHANNEL	Private	C, S	MAMC	Spanish	Documentaries	Adv.
DISCOVERY KIDS	Private	C	MAMC	Spanish	Documentaries Kids	Adv.
ENTERTAINMENT	Private	C	MAMC	English	Entertainment	Adv.
ESPN	Private	C, S	MAMC	Spanish/English	Sport	Spon.
ESPN 2	Private	C	MAMC	Spanish	Sport	Spon.
FOX	Private	C, S	MAMC	Spanish/English	Entertainment	Adv.
FOX KIDS	Private	C	MAMC	Spanish	Generalist Kids	Adv.
FOX SPORTS	Private	C, S	MAMC	Spanish/English	Sport	Spon.
HALLMARK	Private	C	MAMC	English	Movies	Adv.
HBO	Private	S	MAMC	English	Movies	Adv.
HBO PLUS	Private	S	MAMC	English	Movies	Adv.
MGM	Private	C	MAMC	Spanish	Generalist	Adv.
MOVIE CITY 1 (oeste)	Private	S	MAMC	English	Movies	Adv.
MTV	Private	C, S	MAMC	Spanish/English	Music	Adv.
MUNDO TM	Private	C, S	MAMC	Spanish/English	Documental	Adv.
NETPACK	Private	S	MAMC	English	Generalist	Adv.
NICKELODEON	Private	C	MAMC	Spanish	Entertainment Kids	Adv.
SONY	Private	C, S	MAMC	English	Entertainment	Adv.
TNT	Private	C, S	MAMC	Spanish	Generalist	Adv.
TRAVEL CHANNEL*	Private	C	MAMC	Spanish	Culture	Adv.

Source: Directory of media advertisers Ed. Dic. 1999, MAMC = Metropolitan Area Mexico City

*(PEOPLE & ARTS)

INTERNATIONAL CHANNELS						
Channels	Nature	Diffusion	Tech.Pen.	Language	Programming	Revenue
TV GUIDE	Private	C, S	MAMC	Spanish	Channels TV Guide	Adv.
TVE	Private	C	MAMC	Spanish	Generalist	Adv.
USA NETWORK	Private	S	MAMC	Spanish	Generalist	Adv.
WARNER	Private	C, S	MAMC	Spanish/English	Generalist	Adv.

Source: Data Bases Department IBOPE AGB Mexico

PAY TV (ANALOG)						
Channels	Diff.	Subscr.	Language	h/week	Programming	Revenue
ANIMAL PLANET	C	n.a.	Spanish	n.a.	Documentaries	Adv.
ANTENA 3	S	n.a.	Spanish	n.a.	Generalist	Adv.
TELE UNO	C	n.a.	Spanish	n.a.	Generalist	Adv.
CARTOON NETWORK	C, S	n.a.	Spanish	n.a.	Entertainment Kids	Adv.
CINE CANAL	S	n.a.	English	n.a.	Movies	Adv.
CINE CANAL 2	S	n.a.	English	n.a.	Movies	Adv.
CINEMAX	S	n.a.	English	n.a.	Movies	Adv.
CNN ESPAÑOL	S	n.a.	Spanish	n.a.	News	Adv.
CNN INTERN.	C	n.a.	English	n.a.	News	Adv.
DISCOVERY CHANNEL	C, S	n.a.	Spanish	n.a.	Documentaries	Adv.
DISCOVERY KIDS	C	n.a.	Spanish	n.a.	Documentaries Kids	Adv.
ENTERTAINMENT	C	n.a.	English	n.a.	Entertainment	Adv.
ESPN	C, S	n.a.	Spanish/English	n.a.	Sport	Spon.
ESPN 2	C	n.a.	Spanish	n.a.	Sport	Spon.
FOX	C, S	n.a.	Spanish/English	n.a.	Entertainment	Adv.
FOX KIDS	C	n.a.	Spanish	n.a.	Generalist Kids	Adv.
FOX SPORTS	C, S	n.a.	Spanish/English	n.a.	Sport	Spon.
HALLMARK	C	n.a.	English	n.a.	Movies	Adv.
HBO	S	n.a.	English	n.a.	Movies	Adv.
HBO PLUS	S	n.a.	English	n.a.	Movies	Adv.
MGM	C	n.a.	Spanish	n.a.	Generalist	Adv.
MOVIE CITY 1	S	n.a.	English	n.a.	Movies	Adv.
MTV	C, S	n.a.	Spanish/English	n.a.	Music	Adv.
MUNDO TM	C, S	n.a.	Spanish/English	n.a.	Documental	Adv.
NETPACK	S	n.a.	English	n.a.	Generalist	Adv.
NICKELODEON	C	n.a.	Spanish	n.a.	Entertainment Kids	Adv.
SONY	C, S	n.a.	English	n.a.	Entertainment	Adv.
TNT	C, S	n.a.	Spanish	n.a.	Generalist	Adv.
TRAVEL CHANNEL*	C	n.a.	Spanish	n.a.	Culture	Adv.
TV GUIDE	C, S	n.a.	Spanish	n.a.	Channels TV Guide	Adv.
TVE	C	n.a.	Spanish	n.a.	Generalist	Adv.
USA NETWORK	S	n.a.	Spanish	n.a.	Generalist	Adv.
WARNER	C, S	n.a.	Spanish/English	n.a.	Generalist	Adv.
PPE 1*	C	n.a.	English	n.a.	Movies	Adv.
PPE 2*	C	n.a.	English	n.a.	Movies	Adv.
PPV 1*. **	S	n.a.	Spanish/English	n.a.	Kids/Special Events	Adv.
PPV 2*. **	S	n.a.	Spanish/English	n.a.	Kids/Special Events	Adv.
CANAL DEL CONGR.	C	n.a.	Spanish	n.a.	Politics	Gvt.
CINE LATINO	S	n.a.	Spanish	n.a.	Movies	Adv.
CIN. GOL. MULTIP.	C	n.a.	English	n.a.	Movies	Adv.
DE PELÍCULA	C	n.a.	Spanish	n.a.	Movies	Adv.
ECO	C	n.a.	Spanish	n.a.	News	Adv.
GOLDEN CHOICE 2	C	n.a.	English	n.a.	Movies	Adv.
GOLDEN CHOICE I	C	n.a.	English	n.a.	Movies	Adv.

Source: Data Bases Department IBOPE AGB Mexico

*People & Arts, **NICKELODEON from 6:00 to 19:00, ***FOX KID from 6:00 to 19:00

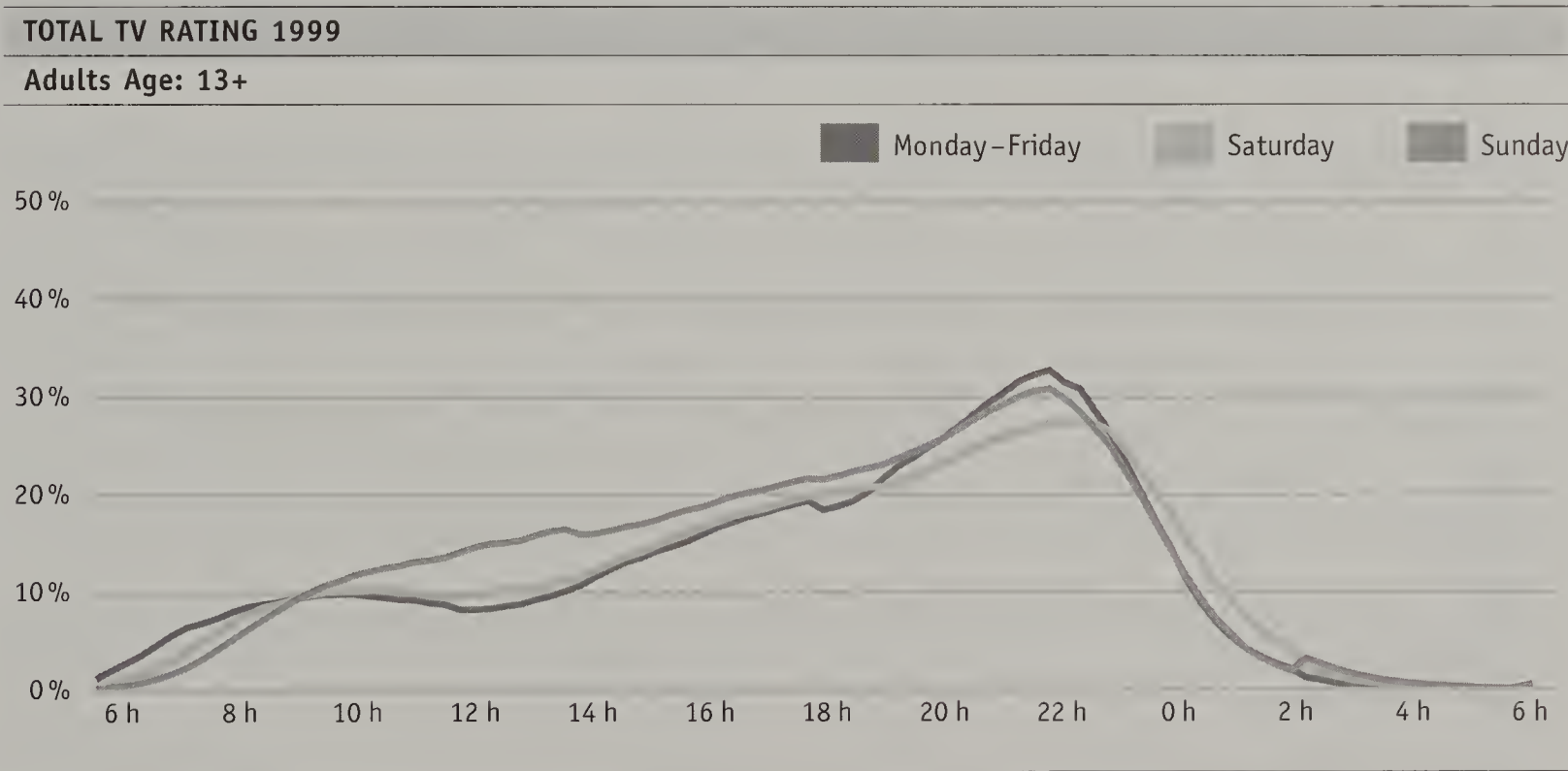
PAY TV (ANALOG)						
Channels	Diff.	Subscr.	Language	h/week	Programming	Revenue
MAS	S	n.a.	Spanish	n.a.	Generalist	Adv.
NEMA	S	n.a.	English	n.a.	Movies	Adv.
MULTIPREMIER	S	n.a.	English	n.a.	Movies	Adv.
PPV3 (PLAYBOY)	C, S	n.a.	English	n.a.	Erotic Entertainment	Adv.
RITMOSON	C	n.a.	Spanish	n.a.	Music	Adv.
TELEHIT	C	n.a.	Spanish	n.a.	Music	Adv.
UNICABLE	C	n.a.	Spanish	n.a.	Generalist	Adv.

Source: IBOPE AGB Mexico

Viewing Patterns

AUDIENCE MEASUREMENT			
Name of the Service and Institute:		IBOPE AGB Mexico, 1991	
Panel/Sampling Size		2 211 households	
Instrument used (people-meter, telefon, face-to-face)		People-meter	
		Population size in 000	
		1st. Semester '99	2nd. Semester '99
Individuals 4+		35 372	38 016
Adults 13+		28 825	31 084
Housewives		8 576	9 028
Young Adults 13–44		21 425	23 540
Children 4–12		6547	6 932

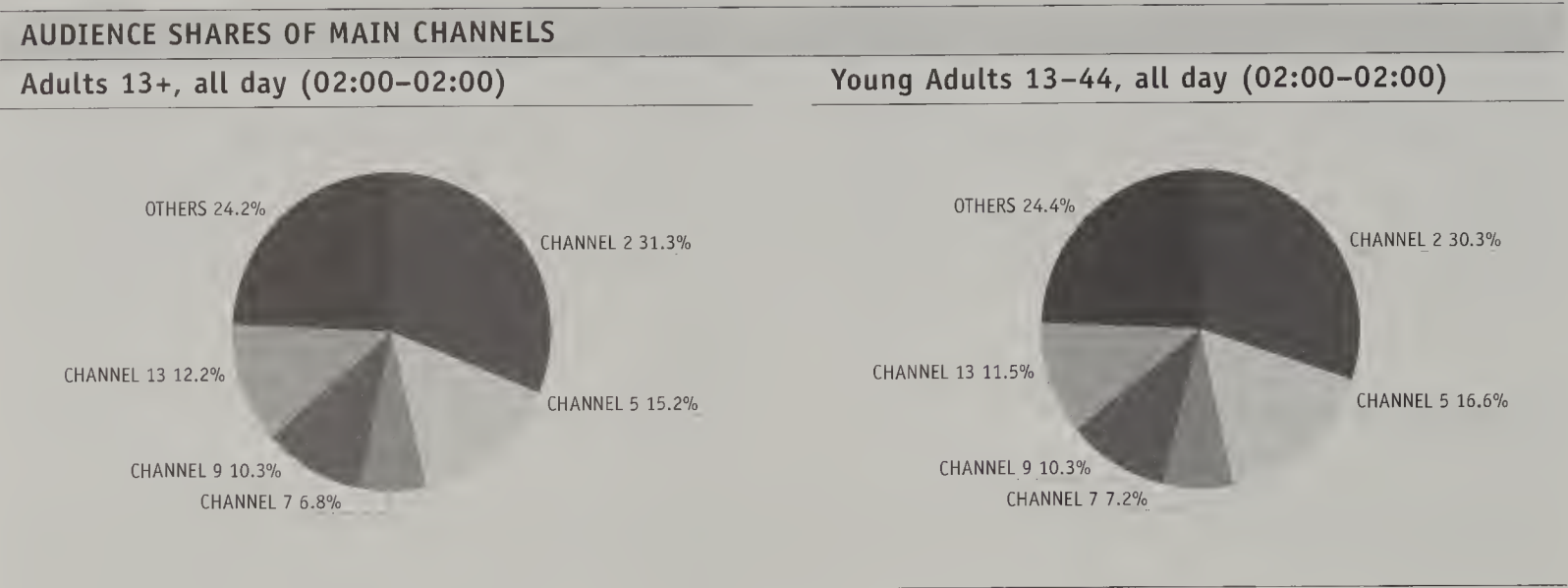
Source: IBOPE AGB Mexico, Change of universe estimates on July 1st, 1999



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 13+			Young Adults 13–44			Children 4–12			Housewives		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	66.0	69.0	71.0	67.0	70.0	72.0	66.0	68.0	70.0	74.0	76.0	78.0
Viewing time per Viewer	244	259	266	222	242	249	236	249	254	276	297	305
Viewing time per Individual	162	178	188	149	170	180	155	169	178	205	225	237

Sources: TELEREPORT; IBOPE AGB Mexico

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 02:00 – 02:00								
	Adults 13+		Young Adults 13–44		Children 4–12		Housewives	
	1998	1999	1998	1999	1998	1999	1998	1999
CHANNEL 2	30.8%	31.3%	29.4%	30.3%	26.3%	27.2%	33.7%	34.2%
CHANNEL 5	15.5%	15.2%	17.0%	16.6%	30.9%	28.5%	14.4%	14.3%
CHANNEL 7	7.2%	6.8%	7.8%	7.2%	7.1%	6.7%	6.6%	6.0%
CHANNEL 9	9.8%	10.3%	9.5%	10.3%	7.7%	8.9%	9.4%	9.9%
CHANNEL 13	12.1%	12.2%	11.7%	11.5%	6.7%	6.2%	12.4%	12.9%
OTHER	24.6%	24.2%	24.6%	24.1%	21.3%	22.5%	23.5%	22.7%

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 13+		Young Adults 13–44		Children 4–12		Housewives	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	6– 19 h	19–22 h	6– 19 h	19–22 h	6– 19 h	19–22 h	6– 19 h	19–22 h
CHANNEL 2	31.8%	34.0%	30.4%	33.4%	23.5%	34.2%	34.7%	37.1%
CHANNEL 5	14.6%	14.6%	16.1%	15.9%	32.6%	22.7%	14.0%	13.1%
CHANNEL 7	5.2%	8.6%	5.6%	9.1%	5.8%	8.1%	4.4%	7.8%
CHANNEL 9	10.4%	10.2%	10.7%	9.7%	9.4%	7.7%	9.9%	9.8%
CHANNEL 13	12.3%	11.9%	11.5%	11.3%	5.5%	6.7%	12.6%	12.9%
OTHER	25.7%	20.7%	25.7%	20.6%	23.2%	20.6%	24.4%	19.3%

Sources: TELEREPORT; IBOPE AGB Mexico

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
PRIVILEGE OF LOVING	Mexico	Channel 2	Daily Soap	21:00	26/02	21.9%	58.8%
FBAL MEXICO-BRAZIL		Channel 5	Sport	20:30	04/08	21.4%	57.0%
DERBEZ EN CUANDO	Mexico	Channel 2	Comedy Show	22:00	20/01	20.2%	57.2%
DREAMING WOMEN	Mexico	Channel 2	Daily Soap	19:00	30/04	18.3%	69.3%
ROSALINDA	Mexico	Channel 2	Daily Soap	21:00	18/06	17.5%	52.4%
ZERO IN BEHAVIOUR	Mexico	Channel 2	Comedy Show	22:00	03/09	17.4%	54.3%
FBAL TOLUCA-ATLAS	Mexico	Channel 2	Sport	13:05	06/06	17.1%	67.1%
CAMILA		Channel 2	Daily Soap	20:00	15/01	16.7%	50.4%
WHAT HAPPENS TO US	Mexico	Channel 2	Comedy Show	22:00	12/01	16.0%	47.7%
I WILL NEVER FORGET YOU	Mexico	Channel 2	Daily Soap	20:00	16/02	15.4%	47.3%
FOR YOUR LOVE	Mexico	Channel 2	Daily Soap	20:00	01/10	15.3%	51.3%
THE BLONDE AND SOMETHING ELSE	Mexico	Channel 2	Comedy Show	22:00	25/01	14.9%	43.9%
FBAL ATLAS-TOLUCA	Mexico	Channel 5	Sport	20:50	03/06	14.7%	43.9%
SPECIAL: WHAT YOU SAW		Channel 2	Magazine	20:00	01/05	14.5%	48.2%
FBAL AMERICA-CRUZ AZUL	Mexico	Channel 2	Sport	19:25	12/12	14.4%	47.5%
DE NUEZ EN CUANDO		Channel 2	Comedy Show	22:00	29/12	14.2%	43.9%
PICARDIA MEXICANA	Mexico	Channel 2	Comedy Show	22:00	25/02	14.0%	42.0%
FBAL AMERICA-GUADALAJARA	Mexico	Channel 2	Sport	20:30	05/12	13.9%	42.5%
DANIELA'S DIARY		Channel 2	Daily Soap	16:00	16/04	13.9%	65.1%
THE COMEDY PEOPLE	Mexico	Channel 2	Comedy Show	22:00	09/08	13.6%	42.2%

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
FEAR DOES NOT RIDE A DONKEY	Mexico	Channel 2	21:00	16/01	13.4%	43.0%
INDEPENDENCE DAY	USA	Channel 5	18:40	26/12	13.1%	43.1%
GHOST	USA	Channel 5	19:30	31/10	10.9%	36.7%
ONE WHO DOES NOT RUN, DOES FLY	Mexico	Channel 2	21:00	07/08	10.7%	37.6%
HARD TARGET	USA	Channel 5	20:50	25/09	10.7%	39.3%
THE MINISTER AND I	Mexico	Channel 2	20:55	09/01	10.6%	36.0%
UP AND DOWN	Mexico	Channel 2	20:55	27/03	10.6%	37.6%
FOOL, FOOL BUT NOT SO MUCH	Mexico	Channel 2	21:00	10/07	9.9%	33.7%
MORTAL KOMBAT	USA	Channel 5	19:30	24/01	9.9%	30.4%
THE ILLITARATE	Mexico	Channel 2	21:00	03/07	9.5%	32.2%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
FBAL MEXICO-BRAZIL		Channel 5	20:30	04/08	21.4%	57.0%
FBAL TOLUCA-ATLAS		Channel 2	13:05	06/06	17.1%	67.1%
FBAL ATLAS-TOLUCA		Channel 5	20:50	03/06	14.7%	43.9%
FBAL AMERICA-CRUZ AZUL		Channel 2	19:25	12/12	14.4%	47.5%
FBAL AMERICA-GUADALAJARA		Channel 2	20:30	05/12	13.9%	42.5%
FBAL MEXICO-EGYPT		Channel 5	20:00	27/07	12.7%	37.6%
FBAL AMERICA-SANTOS		Channel 2	16:45	23/05	12.3%	45.9%
FBAL MEXICO-USA		Channel 2	11:30	01/08	12.2%	58.1%
FBAL BOLIVIA-MEXICO		Channel 5	20:00	29/07	12.2%	38.4%
FBAL MEXICO-SAUDI ARABIA		Channel 2	14:05	25/07	11.5%	48.5%

Sources: TELEREPORT; IBOPE AGB Mexico, Target group: Adults 13+

Top Programmes Channel by Channel

CHANNEL 2							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
PRIVILEGE OF LOVING	Mexico	Daily Soap	41	20:58	60	17.6%	49.4%
DERBEZ EN CUANDO	Mexico	Comedy Show	50	22:00	30	15.0%	44.5%
CAMILA	Mexico	Daily Soap	11	20:00	57	14.5%	45.9%
ZERO IN BEHAVIOUR	Mexico	Comedy Show	36	22:00	30	13.8%	45.0%
DREAMING WOMEN	Mexico	Daily Soap	85	18:58	60	13.4%	53.1%
I WILL NEVER FORGET YOU	Mexico	Daily Soap	94	19:58	60	12.9%	44.4%
THE COMEDY PEOPLE	Mexico	Comedy Show	21	22:00	30	11.9%	37.0%
ROSALINDA	Mexico	Daily Soap	80	21:00	60	11.8%	36.6%
THE BLONDE AND SOMETHING ELSE	Mexico	Comedy Show	22	22:00	30	11.2%	35.1%
WHAT HAPPENS TO US	Mexico	Comedy Show	53	22:00	30	10.3%	32.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL TOLUCA-ATLAS	Mexico	Sport	06/06	13:05	185	17.1%	67.1%
SPECIAL: WHAT YOU SAW		Magazine	01/05	20:00	175	14.5%	48.2%
FBAL AMERICA-CRUZ AZUL		Sport	12/12	19:25	165	14.4%	47.5%
FEAR DOES NOT RIDE A DONKEY	Mexico	Movie	16/01	21:00	120	13.4%	43.0%
JUAN PABLO II, VISIT TO MEXICO	Mexico	Magazine	22/01	14:30	270	12.5%	47.2%
FBAL AMERICA-SANTOS		Sport	23/05	16:45	140	12.3%	45.9%
FBAL MEXICO-U.S.A.		Sport	01/08	11:30	180	12.2%	58.1%
FBAL MEXICO-SAUDI ARABIA		Sport	25/07	14:05	150	11.5%	48.5%
SI TIENES TELE ...HAY DERBEZ	Mexico	Comedy Show	19/12	19:00	60	11.1%	40.5%
FBAL BRAZIL-MEXICO		Sport	03/07	13:25	165	10.9%	52.5%

Sources: TELEREPORT; IBOPE AGB Mexico, Target group: Adults 13+

CHANNEL 5							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
JESUS OF NAZARETH	USA	Series-General	4	21:00	132	5.6%	19.6%
OTRO ROLLO	Mexico	Magazine	35	21:00	178	5.6%	21.2%
JACK HANNAS WILD LIFE ADVENT.	USA	Magazine	4	21:00	60	5.2%	16.3%
WHEN ANIMALS ATTACK	USA	Magazine	5	21:00	60	5.1%	15.5%
DRAGON BALL Z	JAPAN	Cartoon	150	20:30	30	4.1%	14.3%
WORLD'S MOST INCREDIBLE RESC.	USA	Magazine	10	21:00	60	3.8%	11.5%
ANATOMY OF DISASTER	USA	Magazine	6	21:00	60	3.8%	12.3%
PSI FACTOR	USA	Series-Myster.	31	22:00	60	3.5%	12.2%
STARGATE SC-1	USA	Series-General	41	22:00	60	3.4%	12.0%
HIGH TIDE	USA	Series-Action	52	23:10	60	3.3%	20.7%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL MEXICO-BRAZIL		Sport	04/08	20:30	180	23.2%	50.9%
FBAL ATLAS-TOLUCA		Sport	03/06	20:50	110	17.1%	67.1%
INDEPENDENCE DAY		Movie	26/12	18:40	200	21.4%	57.0%
FBAL MEXICO-BRAZIL		Sport	14/07	19:00	160	14.7%	43.9%
FBAL MEXICO-EGYPT		Sport	27/07	20:00	150	13.1%	43.1%
FBAL BOLIVIA-MEXICO		Sport	29/07	20:00	150	13.0%	41.1%
GHOST	USA	Movie	31/10	19:30	170	12.7%	37.6%
HARD TARGET	USA	Movie	25/09	20:50	145	12.2%	38.4%
MORTAL KOMBAT	USA	Movie	24/01	19:30	140	10.9%	36.7%
THE LITTLE RASCALS	USA	Movie	10/01	19:30	110	10.7%	39.3%

Sources: TELEREPORT; IBOPE AGB Mexico, Target group: Adults 13+

CHANNEL 7							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
AY CARAMBA!	Mexico	Comedy Show	250	20:35	30	3.4%	11.0%
FACTS, 21 HOURS	Mexico	News	134	21:00	31	3.2%	10.0%
THE SIMPSONS	USA	Cartoon	251	20:00	32	3.0%	10.7%
CHIQUITOS PERO PICOSOS	Mexico	Magazine	8	21:30	60	2.4%	7.6%
MR. BEAN	UK	Series-Family	28	22:35	29	2.3%	8.6%
THE NANNY	USA	Series-Family	26	19:00	30	2.2%	8.8%
GOOD NIGHT ANABEL	Mexico	Magazine	6	21:30	65	2.2%	6.7%
THE INCREDIBLE SALE	Mexico	Game Show	184	20:00	30	2.1%	7.8%
FACTS, 21:30 HOURS	Mexico	News	99	21:30	30	2.0%	6.0%
MARTIAL LAW	USA	Series-Action	8	23:45	58	2.0%	19.6%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL PACHUCA-CRUZ AZUL	USA	Sport	16/12	19:00	170	9.2%	30.4%
FBAL CRUZ AZUL-AMERICA		Sport	09/12	18:30	160	8.9%	31.7%
FBAL CRUZ AZUL-ATLAS		Sport	26/05	18:00	125	7.7%	32.3%
FBAL PACHUCA-ATLAS		Sport	08/12	19:00	160	7.2%	25.5%
HARD TO DIE III		Movie	21/03	19:00	215	7.1%	23.4%
FBAL MEXICO-BOLIVIA	USA	Sport	11/03	21:30	165	6.2%	21.0%
FBAL SANTOS-AMERICA		Sport	20/05	15:35	145	5.9%	28.3%
101 DALMATIANS		Movie	26/12	21:00	150	5.7%	19.0%
FROM DUSK TILL DAWN	USA	Movie	13/06	20:55	155	5.6%	20.0%
FACTS 21:50 HOURS	Mexico	News	16/12	21:50	30	5.6%	17.8%

Sources: TELEREPORT; IBOPE AGB Mexico, Target group: Adults 13+

CHANNEL 9							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
HARD AND DIRECT (SUNDAY)	Mexico	News	20	22:05	75	4.5%	16.7%
THE KID OF NUMBER EIGHT	Mexico	Childrens-Prog.	41	17:59	60	3.8%	18.9%
CRISTINA	USA	Talk-Show	189	21:00	60	3.1%	12.0%
WRESTLING AAA	Mexico	Sport	50	10:59	175	3.1%	20.3%
OTRO ROLLO	Mexico	Comedy Show	4	22:00	145	3.0%	13.8%
NOT BAD NIGHT	Mexico	Variety Show	6	21:00	225	3.0%	13.1%
EVERYTHING IS VALID	Mexico	Game Show	117	19:30	90	2.9%	10.7%
HARD AND DIRECT	Mexico	News	139	19:30	90	2.8%	10.3%
LOLITA AYALA NEWS	Mexico	News	258	19:00	30	2.6%	11.2%
INTERNATIONAL BOX	Mexico	Sport	7	22:30	75	2.6%	10.4%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL AMERICA-TOLUCA	Mexico	Sport	22/09	20:55	130	7.5%	21.8%
FBAL ATLAS-CRUZ AZUL		Sport	29/05	20:25	150	7.5%	27.0%
FBAL ATLAS-PACHUCA		Sport	11/12	20:30	150	7.1%	26.1%
WOMEN OF TWO		Movie	07/02	19:50	130	7.1%	21.3%
FBAL GUADALAJARA-CRUZ AZUL		Sport	19/05	20:35	170	6.5%	20.8%
FBAL AMERICA-UNAM	Mexico	Sport	03/11	18:50	125	6.3%	22.7%
FBAL URUGUAY-CHILE		Sport	13/07	19:50	145	6.3%	20.4%
FBAL AMERICA-ITALCHACAO		Sport	16/11	20:50	135	6.2%	19.5%
FBAL NECAXA-CRUZ AZUL		Sport	04/12	17:00	140	6.2%	27.7%
LAUGH IN VACATIONS 6		Movie	21/03	19:55	125	6.0%	19.0%

Sources: TELEREPORT; IBOPE AGB Mexico, Target group: Adults 13+

CHANNEL 13							
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Length (m.)	Audience	Share
LIFE THROUGH THE MIRROR	Mexico	Daily Soap	132	21:00	60	5.6%	17.4%
THREE TIMES SOFIA	Mexico	Daily Soap	150	22:00	30	4.9%	15.3%
CATALINA AND SEBASTIAN	Mexico	Daily Soap	119	19:00	60	4.4%	18.8%
THE LOVE OF MY LIFE	Mexico	Daily Soap	123	21:00	60	3.9%	11.9%
THE CANDIDATE	Mexico	Daily Soap	97	22:00	30	3.9%	12.2%
FACTS 22:30 HOURS (MO-FR)	Mexico	News	170	22:30	60	3.9%	15.3%
PERLA	Mexico	Daily Soap	11	20:00	60	3.4%	10.7%
FACTS 22:00 HOURS (SUNDAY)	Mexico	News	14	22:00	65	3.2%	12.3%
SI HAY Y BIEN	Mexico	Magazine	4	22:00	205	3.1%	14.9%
VENTANEANDO CON PATI CHAPOY	Mexico	Magazine	150	18:00	55	3.1%	14.6%

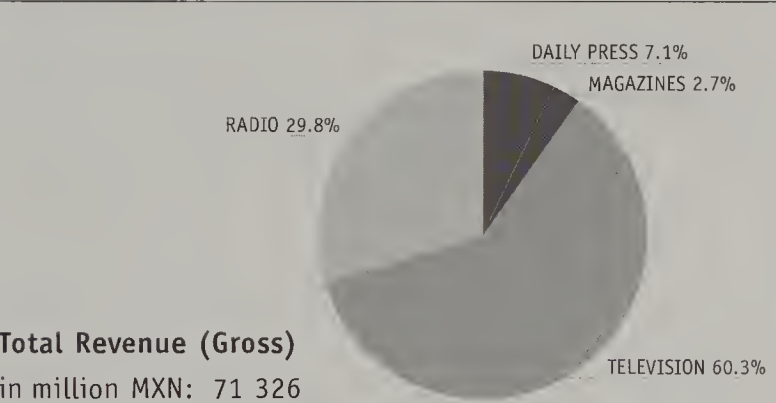
Top 10 Single Programmes	Land	Genre	Date	Start.Time	Length (m.)	Audience	Share
FBAL CRUZ AZUL-PACHUCA		Sport	19/12	20:30	185	11.2%	34.9%
TRIBUTE TO PACO STANLEY	Mexico	Magazine	08/06	8:35	135	10.4%	60.5%
SPECIAL PROGRAM: FACTS	Mexico	Magazine	22/09	22:00	5	7.1%	19.6%
FBAL CRUZ AZUL-AMERICA		Sport	17/04	16:30	165	6.7%	28.4%
FBAL CRUZ AZUL-GUADALAJARA		Sport	22/05	16:00	185	6.1%	26.7%
THE BEST OF ONE AFTER ANOTHER	Mexico	Magazine	09/06	8:30	130	5.9%	46.4%
CONTROVERSIAL DEATH	Mexico	Magazine	11/07	23:10	50	5.7%	24.6%
JUAN PABLO II, ARRIVAL	Mexico	Magazine	22/01	15:00	225	5.5%	25.2%
AMENAZA EN EL PUEBLO	USA	Movie	03/01	16:00	120	5.4%	23.7%
FBAL SANTOS-TECOS		Sport	16/05	15:30	150	5.2%	24.4%

Sources: TELEREPORT; IBOPE AGB Mexico, Target group: Adults 13+

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend (in million MXN)		71 326
Total adspend (in million USD)		7 532
Total adspend (in million EUR)		7 500
TV adspend (in million MXN)		43 023
TV adspend (in million USD)		4 543
TV adspend (in million EUR)		4 524
TV adspend in % of GDP		1.04
TV adspend per capita (USD)		46.0

SHARE OF MEDIA EXPENDITURE		GROSS
Category: Market Share in %		

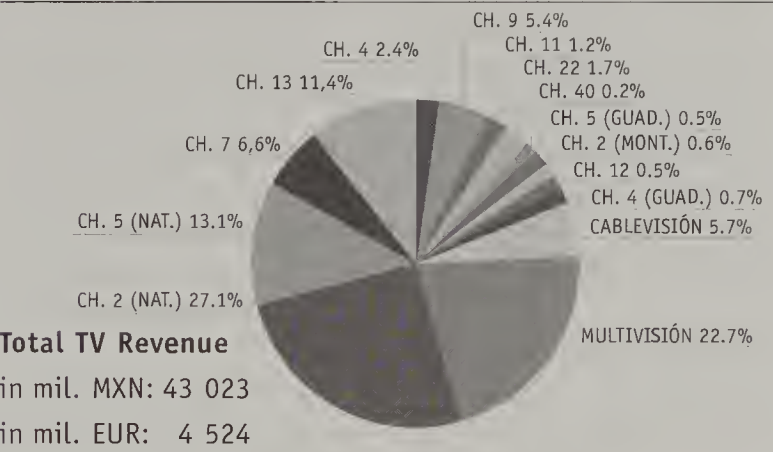


Source: IBOPE AGB Mexico

TV ADVERTISING STATISTICS	
Total number of spots broadcast	3 580 668
Average spot length (in sec.)	25.14
Total number of advertisers	14 525
Number of TV advertisers	2 898
Total number of advertised products	15 800
Number products advertised on TV	9 281

Source: IBOPE AGB Mexico Software: Adspend 2000 Jan-Dec '99

SHARE OF GROSS TV ADVERTISING REVENUE	
Channels: Advertising Market Share in %	



TOP 10 ADVERTISING FIGURES				
TV Advertising Sectors	3 Media *	Television	Spent in TV	Share of TV Expenditure
EDUCATION/MEDIA	12 830	9 896	77.1%	23.0%
SOCIAL SERVICES/GOVERNMENT	9 751	4 431	45.4%	10.3%
HEALTH/PERSONAL CARE/COSMETICS	4 865	4 338	89.2%	10.1%
RETAIL	11 153	3 840	34.4%	8.9%
FOOD	4 073	3 715	91.2%	8.6%
DRINKS	3 936	2 928	74.4%	6.8%
FINANCE & INSURANCE	3 740	1 737	46.4%	4.0%
AUTOMOTIVE	3 225	1 543	47.8%	3.6%
GRUPOS EMPRESARIALES	2 329	1 502	64.5%	3.5%
WASHING PRODUCTS	1 238	1 224	98.9%	2.8%
OTHERS	14 184	7 869	55.5%	18.3%
TV Advertisers**				
PROCTER & GAMBLE	1 027	1 009	98.2%	2.7%
COLGATE PALMOLIVE	969	949	97.9%	2.5%
THE COCA COLA EXPORT	723	534	73.8%	1.4%
PRESIDENCIA DE LA REPUBLICA MEXICANA	1 009	523	51.8%	1.4%
COMPANIA NESTLE	542	486	89.7%	1.3%
IND VINICOLAS DOMECQ	525	412	78.5%	1.1%
COSBEL	422	390	92.4%	1.0%
KELLOGGS DE MEXICO	419	384	91.6%	1.0%
FONOVISA DISQUERA	344	341	99.1%	0.9%
CHRYSLER MEXICO	429	339	79.0%	0.9%
OTHERS	64 918	37 657	58.0%	100.0%
Total (in million MXN)	71326	43024	60.3%	100.0%
Total (in million EUR)	7 500	4 524	60.3%	100.0%

Source: IBOPE AGB Mexico

*Press, TV, Radio, **Top 10 TV advertisers does not include TV channels expenditure (autopromotionals). They are included in „Others“

South Africa introduced its first television service in 1976. For the first two years there was no commercial on television. In 1977, the British actors' union, Equity, in protest against apartheid, banned the sale of British programme material to the SABC. This ban was maintained for 16 years, paving the way for the dominance of US sourced product fare on SABC television.

The first pay-TV station was introduced in 1986, the first competition to the state controlled SABC. During the years till the first all-race elections in 1993, the SABC was largely a state mouthpiece used for apartheid propaganda purposes. With the advent of democracy, the SABC revamped and re-launched its television services as SABC 1, SABC 2, and SABC 3. In 1998, after a failed launch of two analogue channels, the SABC launched two satellite channels on a digital platform. The year also saw the introduction of South Africa's first private, national, free to air terrestrial television channel (ETV) broadcasting in direct competition to the SABC and, although beset with start problems, the channel is already enjoying about 12% share of the television audience.

In 1999 came the 1999 Broadcasting Act, replacing the old Act of 1976. It ushered in for the first time a comprehensive media policy framework for the country and the industry. One of its most critical aspects was the stipulation that the public broadcaster, the SABC become a corporation. In this process, the broadcaster has to be split into two components – a commercial component and a public service component. The commercial component would be run on strictly commercial lines whilst the public service mandate would be met through the public service arm of the broadcaster. For the time being, the public broadcaster is funded primarily through advertising (78%) and license fees (18%). The new free to air channel is funded through advertising whilst the Pay channel MNET enjoys funding from both subscriptions and advertising.

In terms of programme strategy, the SABC anchors itself on strong local programming and news. This strategy reflects the mandate the public broadcaster has from the regulatory authority. The three channels' full spectrum schedules have to cater for a total of eleven official languages between them. There is, however, some differentiation in positioning. SABC 1 is a young vibrant channel whose programming is primarily targeted to the 16--24 age group. SABC 2's programming is family oriented, has the strongest local programming thrust and caters largely for the 25-49 age group. SABC 3 is the cosmopolitan channel that is strong on news, current affairs and quality entertainment broadcasts, predominantly in English. MNET, the pay channel, has always programmed for the upper end of the audience market, with a strong entertainment and sports orientation. ETV, the new kid on the block, is still establishing a firm strategy. It seems to be everything to everyone but it is slowly overtaking MNET as the "doyen" of TV entertainment with its strong performance on movies. Its local content line-up is still weak but some investments are

being made in that direction. It is presently dominated by foreign, especially US products. All the channels are investing heavily in talk shows, local soaps, and news and sports programming as the focal point of competition.

Three methods of measurement are currently available: AMPS (All Media Products Survey) provides average yesterday viewer-ship based on a sample of 16 000 (two surveys per year) RAMS (Radio Audience Measurement Survey) utilises 1/4 hour Diary technique, primarily for radio but all TV channels are measured as a control sample of 7 000 (four surveys per year). TAMS (Television Audience Measurement Survey) utilises peplemeters to provide a time weighted average audience. Sample of 800 homes moving up to 1 200 reporting homes by April 2001. Currently weekly reports, day after reports by early 2001. There have been a number of significant developments in the South African measurement system in the last two years. This mainly arose from the media industry's concerns over the low patronage levels in South Africa, which tended to be lower than those in the rest of the world. It is planned that the more sophisticated and technically advanced Euro-meter will gradually replace existing meters.

There is not much regulation relating to advertising on South African television. However, advertising is restricted to a maximum of twelve minutes per broadcast hour. No differentiation is made between public and private operators as far as advertising minutes are concerned. Broadcasters themselves, however, reacting to audience likes and dislikes, do not put in ad breaks during movie broadcasts. The incidence of product placement seems to be a growing trend in local productions and this is raising some concerns.

The bulk of advertising expenditure is in traditional classical ads, but programme and sport sponsorship continues to account for large revenues. Product placement in local programming is currently attracting great interest. Direct response and infomercials account for a fair slice of prime time advertising. Advertising agencies and specialist media shops are the primary purchasers of TV spots. The latter is growing in importance. Accommodation is made for direct buying as well as for new emerging advertisers and public service broadcasting where time is available.

South Africa

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General Data

COUNTRY	
Land area (km ²)	1 219 090
Total population	40 584 000
Number of households	9 059 571
Average household size	4.5
In % of households equipped	
Phone	28.8
Mobile telephone subscribers	12.4
PC's	9.1
Internet access	4.2
Internet users	4.4**

ECONOMICS	
GDP in million USD (at current prices)	123 578*
GDP per capita in USD (at current prices)	3 045*
Inflation rate in 1999 (in %)	5.2*
Value of ZAR in Euro (EUR)	1 EUR = 6.18 ZAR
Value of ZAR in US-Dollar (USD)	1 USD = 6.16 ZAR

Source: SABC Research *Econometrix Ltd. South Africa, **New Economy

TV OVERVIEW	
Total number of TV households (TVHH)	5 807 185
In % of all households	64.1
Numbers of channels received by 70% of the population	n.a.
TV License-Fee cost per year	n.a.

TV EQUIPMENT	
	in % of TVHH
Colour TV	49.5
Multiset (homes with more than 1 TV set)	11.6
VCR	26.8
Teletext	n.a.
Remote control	n.a.

Source: SABC Research *TV International 2000

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	15.5*
Satellite	private dish/DTH	3.7
	collective dish/SMATV	n.a.
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	n.a.

TV SUBSCRIPTION			
Analog pay TV subscribers	12.0%	Digital TV subscribers	400 000*

Source: Stats. SA & AMPS 1999, SABC Research *TV International 2000

TV Landscape

DOMESTIC CHANNELS (NATIONAL PUBLIC)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
SABC 1	1976	n.a.	84%	English & Nguni	n.a.	Generalist	Adv., L-F	In-house
SABC 2	1996	n.a.	86%	Afrikaans& Sotho	n.a.	Generalist	Adv., L-F	In-house
SABC 3	1996	n.a.	72%	English	n.a.	Generalist	Adv., L-F	In-house
BOP	1984	n.a.	9%	English	n.a.	Generalist	Adv.	In-house

Source: SABC Research

DOMESTIC CHANNELS (NATIONAL PRIVATE)								
Channels	Launch	Diff.	Tech.Pen.	Language	h/week	Programming	Revenue	Sales H.
ETV	1998	n.a.	63%	English	n.a.	Generalist	Adv.	In-house
CSN	n.a.	n.a.	30%	English	n.a.	n.a.	Adv., Sub.	In-house

Source: SABC Research

PAY TV (ANALOG)								
Channels	Launch	Diff.	Subscribers	Language	h/week	Programming	Revenue	Sales H.
M-Net	1986	n.a.	1 021 000	English	n.a.	Generalist	Adv., Sub.	In-house

Source: SABC Research

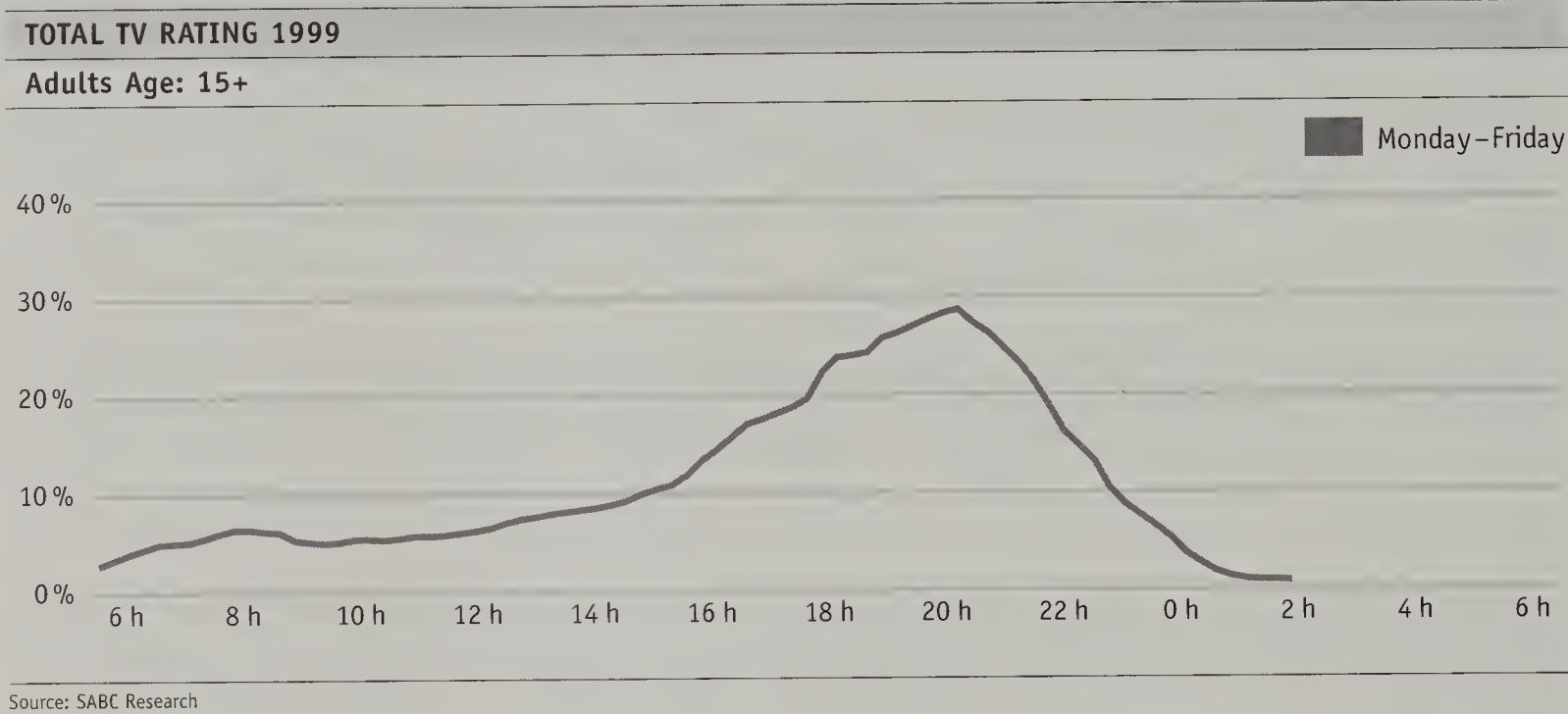
DIGITAL PACKAGES						
Channels	Launch	Diffusion	Subscribers	No. of channels	Revenue	Sales House
DSTV	1995	S	400 000	40	Sub.	n.a.

Source: TV International 2000

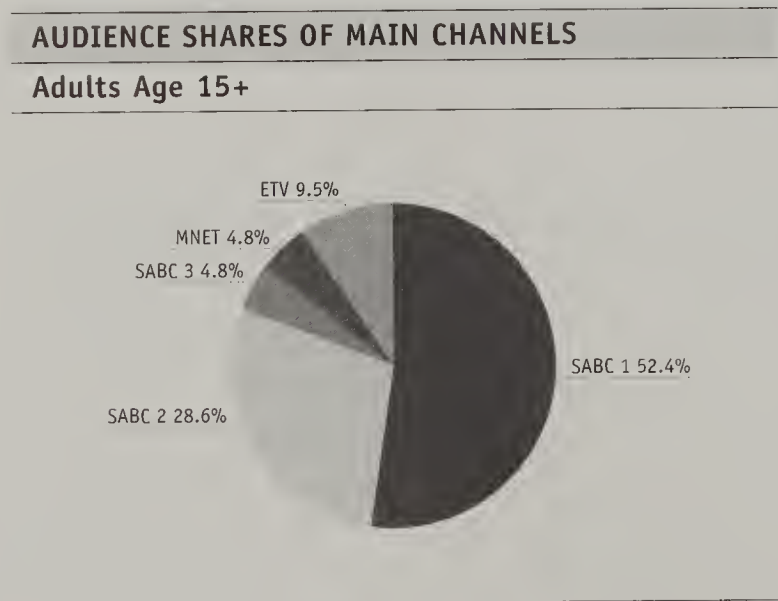
Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	South African Advertising Research Foundation (SAAF)
Panel/Sampling Size	800 households
Instrument used (people-meter, telefon, face-to-face)	people-meter

Source: SABC Research



Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS/BY DAY PARTS		
	Adults 15+	
	Day Time 6–23 h	Prime Time 18–22 h
SABC 1	52.4%	50.9%
SABC 2	28.6%	18.3%
SABC 3	4.8%	7.1%
MNET	4.8%	18.8%
ETV	9.5%	4.0%

Source: SABC Research

Top Programmes Channel by Channel

SABC 1				
Top 10 Single Programmes	Land	Genre	Date	Audience
GENERATIONS	USA	Daily Soap	18/05	17.8%
GENERATIONS	USA	Daily Soap	17/05	17.5%
GENERATIONS	USA	Daily Soap	24/05	17.4%
GENERATIONS	USA	Daily Soap	16/05	17.3%
GENERATIONS	USA	Daily Soap	25/05	17.2%
DAYS OF OUR LIVES	USA	Daily Soap	24/05	17.1%
MUSIC	n.a.	Music	17/05	16.6%
DAYS OF OUR LIVES	USA	Daily Soap	17/05	16.5%
DAYS OF OUR LIVES	USA	Daily Soap	18/05	16.5%
EMZINI WEZINSIZWA	South Africa	Drama	13/01	16.3%

Source: SABC Research; Period January-May 2000

SABC 2				
Top 10 Single Programmes	Land	Genre	Date	Audience
KELEBONE	South Africa	Drama	15/05	14.6%
LOTTERY	South Africa	Game Show	20/05	14.4%
FBAL AFCON CUP		Sport	10/05	14.2%
MUVHANGO	South Africa	Drama	24/05	13.9%
MUVHANGO	South Africa	Drama	17/05	13.7%
HA A MELE DITSHIBA	South Africa	Drama	27/03	13.4%
HA A MELE DITSHIBA	South Africa	Drama	03/04	13.4%
SPORTS SHOTS		Sport	15/05	13.2%
LOTTERY	South Africa	Game Show	27/05	13.2%
HA A MELE DITSHIBA	South Africa	Drama	10/04	13.0%

Source: SABC Research; Period January-May 2000

SABC 3				
Top 10 Single Programmes	Land	Genre	Date	Audience
CRICKET		Sport	12/04	10.4%
CRICKET		Sport	13/02	9.1%
CRICKET		Sport	14/04	9.0%
NEWS	South Africa	News	14/04	8.6%
SONGS OF PRAISE	South Africa	Religion	13/02	8.4%
ISIDINGO: THE NEED	South Africa	Daily Soap	22/05	8.4%
ISIDINGO: THE NEED	South Africa	Daily Soap	03/01	8.3%
CRICKET		Sport	16/04	8.3%
ISIDINGO: THE NEED	South Africa	Daily Soap	15/05	7.9%
CRICKET		Sport	26/01	7.8%

Source: SABC Research; Period January-May 2000

ETV				
Top 10 Single Programmes	Land	Genre	Date	Audience
JUMANJI	USA	Movie	23/04	6.2%
EXECUTIVE DECISION	USA	Movie	14/05	5.4%
MAVERICK	USA	Movie	21/05	5.3%
ASSASSINS	USA	Movie	07/05	5.0%
THE SPECIALIST	USA	Movie	15/01	4.9%
WHITE SQUALL	USA	Movie	28/05	4.9%
UNFORGIVEN	USA	Movie	26/03	4.6%
FIRST KNIGHT	USA	Movie	02/04	4.6%
WCW THUNDER	USA	Movie	29/04	4.6%
BABY-SECRET OF...	USA	Movie	27/05	4.5%

Source: SABC Research; Period January-May 2000

MNET				
Top 10 Single Programmes	Land	Genre	Date	Audience
CARTE BLANCHE INSERT	South Africa	Magazine	19/03	6.8%
WHO WANTS TO BE A MILLIONAIRE	South Africa	Game Show	06/02	6.4%
WHO WANTS TO BE A MILLIONAIRE	South Africa	Game Show	05/03	6.4%
WHO WANTS TO BE A MILLIONAIRE	South Africa	Game Show	26/03	6.4%
EGOLI – PLACE OF GOLD	n.a.	Daily Soap	18/05	6.4%
WHO WANTS TO BE A MILLIONAIRE	South Africa	Game Show	27/02	6.4%
US MARSHALLS	USA	Movie	16/01	6.3%
WHO WANTS TO BE A MILLIONAIRE	South Africa	Game Show	19/03	6.2%
WHO WANTS TO BE A MILLIONAIRE	South Africa	Game Show	23/04	6.2%
EGOLI- PLACE OF GOLD	n.a.	Daily Soap	16/05	6.2%

Source: SABC Research; Period January-May 2000

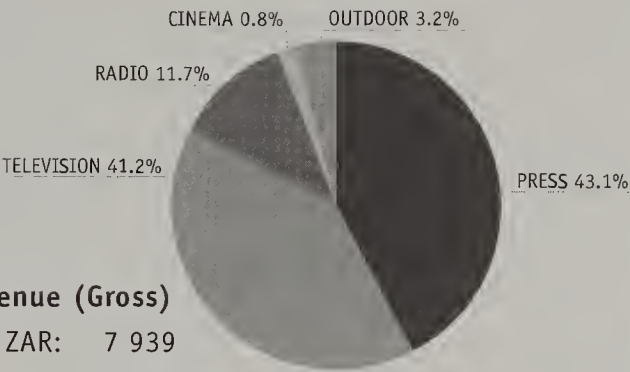
Advertising Expenditure

ADVERTISING FIGURES	GROSS
Total adspend (in million ZAR)	7 939
Total adspend (in million USD)	1 289
Total adspend (in million EUR)	1 284
TV adspend (in million ZAR)	4 375
TV adspend (in million USD)	710
TV adspend (in million EUR)	708
TV adspend in % of GDP	0.4
TV adspend per capita (USD)	50.3

TV ADVERTISING STATISTICS	
Total number of spots broadcast	171 887
Average spot length (in sec.)	31.1
Total number of advertisers	n.a.
Number of TV advertisers	n.a.
Total number of advertised products	n.a.
Number products advertised on TV	n.a.

Source: Constant Watch

SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	

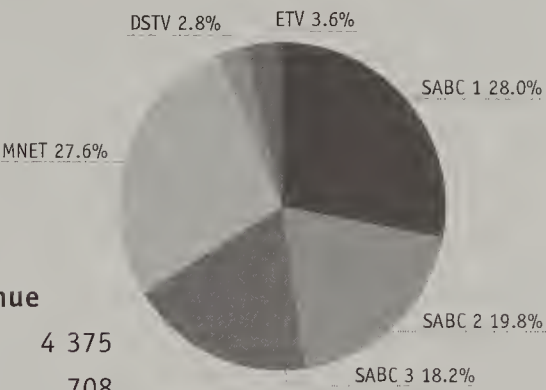


Total Revenue (Gross)

in million ZAR: 7 939
in million EUR: 1 284

Source: Constant Watch

SHARE OF TV ADVERTISING REVENUE	
Channels: Advertising Market Share in %	



Total TV Revenue

in million ZAR: 4 375
in million EUR: 708

Ratings are up, advertising volume is brimming, quiz-shows are in primetime again: no, it is not the 1950s, we have a new millennium. After long periods of trial and error, where all the networks struggled in vain to haunt the same viewer profiles, new ideas have finally glued more and broader audiences to their screens. In former years, the top-rated network had completed the season with lower market-shares than the third ranked in the year before. What has happened to the flickering box? Who has pulled it out of its corner?

“The face of television has changed dramatically over the last 10 months”, said CBS CEO Leslie Moonves, adding that “there are no rules in what's going to work and what’s not.” Maybe there are no rules but some established standards have been overthrown and some new principles established, some habits abandoned and some customs tailored to new audiences: it is European productions that have finally – and with utmost success – conquered the New World. What had looked like a short success in the summer of 1999, proved to be a trend lasting for the whole television-season. UK’s Celador production’s “Who wants to be a millionaire” rocked the tube, and television was – for the first time in decades – the mass medium to cement the audiences in their living rooms. Regis Philbin and his way of treating candidates – to comfort and challenge them, to question their answers and probe their self-confidence – made history on US-television. No sooner than ABC's quiz-show proved to be a big hit, there were look-alikes and comparable concepts. Which did not work.

In the May-sweeps, there was another European production taking the audience in a – lasting – storm: CBS introduced “Survivor”, was despised by critics and competitors alike. But finally, CBS proved that with fresh concepts, new settings and unknown contestants there is a way to attract a new audience to a network once unloved as the least attractive alternative. And with the final episode bagging more than 51 million pairs of eyes, the CBS telecast was – after Super Bowl XXXIV – the second-most watched show of the millennium (still counting). Not bad for a summertime padding. And CBS went one step further with “Big Brother”. The “Tiffany Network” – in recent years famous for drawing older demographics only – is increasingly attracting 18-34-year-olds with its reality-based shows. Not that “Big Brother” was nearly as successful as the dramatic insular shoot-out. But bringing real people in front of real couch potatoes tends to magnetize younger communities before the big display in the living-room.

So there was quiz success on ABC and reality inflating CBS’ ratings. What about NBC – did the peacock lose its feathers? No reality programmes tried out in the summer, nothing on the box for the autumn season – except for “Dateline” and the “real” Olympics – few new concepts, and on Thursdays: the serial productions with a lighter tone less successful. With one exception:

“Friends”, NBC’s #2 programme, which proved that a first-rate cast and a good company with excellent scripts can still draw audiences and ease the peacock network's Thursday woes for still another season.

Comparing the #1 network-sitcom, NBC’s “Friends” with cable’s #1, HBO’s “Sex and the city”, there are striking differences in the content and format of the production. Not that “Friends” is conventional – it is original and inventive even in its fifth year. But while NBC shows a 45-minute sitcom, premium cable can provide a series closer to the lives of the thirty- and forty-something working women. With the open, sometimes blatant, and almost palpable language of adults relishing their middle age, 25 minutes shot in an expensive single-camera production at locations in the city, “Sex” also sets standards in narration and actors addressing the audience behind the camera. Cable shows can be more daring and audacious than unfocussed mainstream networks – and a new, still light and dramatic tonality closer to reality has conquered the US-living-rooms. Of course, the show is also a good example of what the cross-promotion media-powerhouses like Time-Warner can create: not only did it issue Candce Bushnell’s book, but Warner produced the show, aired it on its cable-service HBO, contrived title-stories in “People” magazine and “Time” this summer and is now releasing the first season on VHS and DVD. NBC's “Friends“ is, incidentally, also produced in association with Warner Bros. Television.

Talking about sitcoms: “Ally McBeal”, “Moesha”, and “Spin City” were not unsuccessful, though their story-lines proved to be less resistant to selective viewers and the games-mania. Tuesday's sitcoms, ABC’s “Dharma” and NBC’s “Frazier” were top again this year.

USA

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The last episode of "Beverly Hills, 90210" marked the cap stone of a decade that went for young audiences with new faces and worn concepts. The 21st century began on US-television with a powerful return to dramatic fiction fare. While "Emergency Room" was still the number one production, it was also the most expensive regular drama series. NBC was reported to pay about 13 mill. USD for each single episode – with the right to re-run it during the summer period. Already in syndication, the older episodes still run on the various cable channels and on WB with competitive audience figures. "West Wing", the White House drama series, will be remembered, as well as David E. Kelley's courtroom production "The Practice" on ABC. "Once and Again" was a fresh new dramatic format on divorcees' issues of jobs, dating, and bringing up their children alone by the team of "Thirtysomething", Marshall Herskovitz and Edward Zwick. The same chord of divorce and private/professional life is struck in CBS' new drama highlight "Judging Amy", spiced up by the contrast of city lifestyles and country values.

Event programming was tops again: The Academy Awards and especially Super Bowl XXXIV on ABC this year were very successful in audience ratings and in advertising sales. The final broadcast of "Survivor" was also an event with more than 51 million people watching.

Syndication ratings during the sweeps periods plunged again compared to the previous year: only prime-access-time entertainment-news and celebrity-gossip formats like "Entertainment Tonight" and "Access Hollywood" were up, along with the "Hollywood Squares" game-show. Daytime talk suffered from cable's firmer daytime programming with "Oprah" still leading before "Jerry Springer", "Rosie" and – here he goes again – "Live with Regis and Kathie Lee". Courtroom television was still an issue, watched by more people than in the previous years. As in the dramatic fare on prime-time television, divorce courts were new and up in the ratings.

The year 2000 is an extremely good year for television advertising in the United States. Not only is it an election year, with advertising dollars flooding the medium with the highest impact, but the economy is very robust, so that the automobile industry, telecommunications and the fast moving consumer goods are investing in building brands and challenging their respective competition. Increased ratings on network television and the imminent Olympics have fueled upfront adsales for the 2000/2001 season. NBC is said to have raised a record USD 900 mill. for the average nine commercial minutes in each hour of Olympic broadcasting. CBS will cash in on the Super Bowl broadcast in 2001 and start "Survivor II" immediately the day after – with triplex ad-rates. Market experts see a certain slowdown in some of the growth industries – dot.coms, telecommunications – but pharmaceutical advertising and financial services are expected to thrive, as baby-boomers are getting older. With soaring profits, company mergers and take-overs were in the highlights again. While last season, the mer-

ger of Viacom and CBS was hitting the headlines, it was nothing compared to the shift of powers the announcement of AOL to take over Time-Warner has initiated. Not fully approved by the FCC and the DOJ up till now, the new economy showed its sting when a distribution service and internet access platform non-existent 10 years ago announced to take control of the #1 entertainment and media company worldwide. The deregulation of the industry made some revisions possible: NBC's creeping take-over of Paxton Communication and the PAX network, as well as Viacom controlling UPN.

Now that News Corp. has taken over Chris Craft, it is likely that UPN's prestigious stations will be FOX stations next year. Monopoly games are played, but it is definitely not the 1950s. The cold war is over, no tailfins on cars, no "Lucy" on the television screen and a remote control in the hands of every viewer. Computers do not take up whole floors or houses any more, but are present in almost every second home. And three quarters of US homes are cabled.

Not only the programmes and the lifestyles of the viewers have changed through the years, the business models of television are changing: cable revenues are a major part of networks' profits, internet platforms are the key to integrated offers towards the advertising industry. The driving force to move viewers from broadcast on cable and its internet platforms still lies in the promotional power of the medium that entered the stage some fifty years ago: television.

General Data

COUNTRY	
Land area (km ²)	9 372 610
Total population	263 000 000
Number of households	102 680 000
Average household size	2.7
In % of households equipped	
Phone	94.8
Mobile telephone subscribers	33.0
PC's	58.7
Internet access	45.0
Internet users	49.2

ECONOMICS	
GDP in million USD (at current prices)	8 953 572
GDP per capita in USD (at current prices)	32 570
Inflation rate in 1999 (in %)	1.4
Value of USD in Euro (EUR)*	1 USD = 0.9998 EUR
Sources: Nielsen Media Research, January 2000; Cellular Telecommunications Industry Association	
*Dec. 1999	

TV OVERVIEW	
Total number of TV households (TVHH)	100 800 000
In % of all households	98.2
Numbers of channels received by 70% of the population	62

Source: Nielsen Media Research

TV EQUIPMENT	
	in % of TVHH
Colour TV	99.0
Multiset (homes with more than 1 TV set)	76.0
VCR	85.0
Teletext	n.a.
Remote control*	95.0

Source: Nielsen Media Research

*1998

TV DISTRIBUTION		
		in % of TVHH
Cable	passed	n.a.
	connected	70.5
Satellite	private dish (DBS X C Band)	9.4
	collective dish/SMATV	0.9
Terrestrial	analog	n.a.
	digital	n.a.
	MMDS	0.7

TV SUBSCRIPTION			
Analog pay TV subscribers	n.a.	Digital TV subscribers	n.a.

TV Landscape

TERRESTRIC CHANNELS							
Channels	Main owner	Launch	Tech.Pen.	Language	h/week	Programming	Revenue
ABC	Walt Disney Co.	1953	99%	English	22	Generalist	Adv.
CBS	Viacom	1941	99%	English	22	Generalist	Adv.
NBC	General Electr. Corp	1939	99%	English	22	Generalist	Adv.
FOX NETWORK	Newscorp.	1986	99%	English	15	Generalist	Adv.
UPN	Viacom	1995	97%	English	10	Generalist	Adv.
WB NETWORK	Time Warner/Tribune	1995	87%	English	11	Generalist	Adv.
PBS	Public Network	1969	99%	English	22	Generalist	Fund.*
PAX	AMEX/PAX/Gen. Elec.	1997	74%	English	n.a.	Generalist	Adv.
TELEMUNDO	Sony, LibertyMedia**	1987	n.a.	Spanish	22	Generalist	Adv.
UNIVISION	Televisa, Others	1976	n.a.	Spanish	222	Generalist	Adv.

Source: NCTA, Nielsen Media Research

*States, Adv., **Station Partners

CABLE NETWORKS*

Channels	Launch	Tech. Pen.	Language	Programming	Revenue
A&E	1984	76.6%	English	Cult., Histo., Biograp.	Cable fees, Adv.
AMERICAN MOVIE CLASSICS	1984	72.6%	English	Classic movies	Cable fees**
ANIMAL PLANET	1996	61.0%	English	Natural	Cable fees, Adv.
BET	1980	60.1%	English	Generalist/Ethnic	Cable fees, Adv.
BRAVO	1980	45.2%	English	Entertainment	Cable fees, Adv.
CMT	1983	40.3%	English	Music	Cable fees, Adv.
CNBC	1989	71.9%	English	Economy	Cable fees, Adv.
CNN	1980	77.7%	English	News	Cable fees, Adv.
COMEDY CENTRAL	1991	65.1%	English	Comedy	Cable fees, Adv.
COURT TV	1991	41.8%	English	Trials	Cable fees, Adv.
E! TELEVISION	1990	62.2%	English	Entertainment	Cable fees, Adv.
ESPN	1979	77.6%	English	Sport	Cable fees, Adv.
ESPN 2	1993	70.0%	English	Sport (youth)	Cable fees, Adv.
FOOD NETWORK	1993	48.7%	English	Health/Food	Cable fees, Adv.
FOX FAMILY CHANNEL	1996	76.7%	English	Children	Cable fees, Adv.
FOX NEWS CHANNEL	1996	50.4%	English	News	Cable fees, Adv.
FX	1994	48.8%	English	Generalist	Cable fees, Adv.
GAME SHOW NETWORK	1994	26.5%	English	Game Shows	n.a.
GREAT AMERICAN COUNTRY	n.a.	14.6%	English	n.a.	n.a.
HEADLINE NEWS	1982	73.2%	English	News (1/2 hr)	Cable fees, Adv.
HOME & GARDEN	1994	62.4%	English	Home /Instructional	Cable fees, Adv.
LIFETIME	1984	75.7%	English	Women	Cable fees, Adv.
MSNBC	1996	56.1%	English	News	Cable fees, Adv.
MTV	1981	74.3%	English	Music	Cable fees, Adv.
NICKELODEON	1979	77.0%	English	Children	Cable fees, Adv.
NICK-AT-NITE	1985	77.0%	English	Classic-TV	Cable fees, Adv.
ODYSSEY	1984	26.5%	English	n.a.	n.a.
SCI-FI	1992	62.6%	English	Science-fiction	Cable fees, Adv.
TBS-SUPERSTATION	1976	78.8%	English	Generalist	Cable fees, Adv.
THE BOX	1985	19.5%	English	Music	Cable fees, Adv.
THE CARTOON NETWORK	1992	63.3%	English	Cartoons	Cable fees, Adv.
THE DISCOVERY CHANNEL	1985	77.9%	English	Documentary	Cable fees, Adv.
THE GOLF CHANNEL	1995	31.1%	English	Sport	Cable fees, Adv.
THE HEALTH NETWORK	1996	16.4%	English	Health/Medicine	Cable fees, Adv.
THE HISTORY CHANNEL	1995	62.9%	English	History	Cable fees, Adv.
THE LEARNING CHANNEL	1991	73.3%	English	Education	Cable fees, Adv.
THE TRAVEL CHANNEL	1987	42.2%	English	Travel	Cable fees, Adv.
THE WEATHER CHANNEL	1982	75.5%	English	Weather	Cable fees, Adv.
TNN	1983	76.3%	English	Country lifetime	Cable fees, Adv.
TOON DISNEY	1998	13.2%	English	Cartoons	Cable fees
TURNER NETWORK TELEVISION	1988	77.5%	English	Entertainment	Cable fees, Adv.
TV GUIDE (PREVUE)	1988	53.4%	English	n.a.	n.a.
TV LAND	1996	48.4%	English	Classic TV	Cable fees, Adv.
USA	1977	77.6%	English	Entertainment	Cable fees, Adv.
VH-1	1985	70.5%	English	Music	Cable fees, Adv.
WGN Cable	1978	48.5%	English	Generalist	Cable fees, Adv.

Source: Nielsen Media Research

*Most of these channels are distributed via cable. However ADS (Alternated Delivery Services) ist on the rise.
ADS includes SMATV, MMDS, Satellite and DBS, **Adv. Fees

PREMIUM PAY NETWORKS					
Channels	Launch	Tech. Pen.	Language	Programming	Revenue
DISNEY CHANNELS	1983	64.2%	English	Family	Sub.
HBO	1972	32.8%	English	Fiction/Events	Sub.
CINEMAX	1980	20.5%	English	Movies	Sub.
SHOWTIME	1976	20.6%	English	Fiction/Events	Sub.
THE MOVIE CHANNEL	1979	15.6%	English	Movies	Sub.

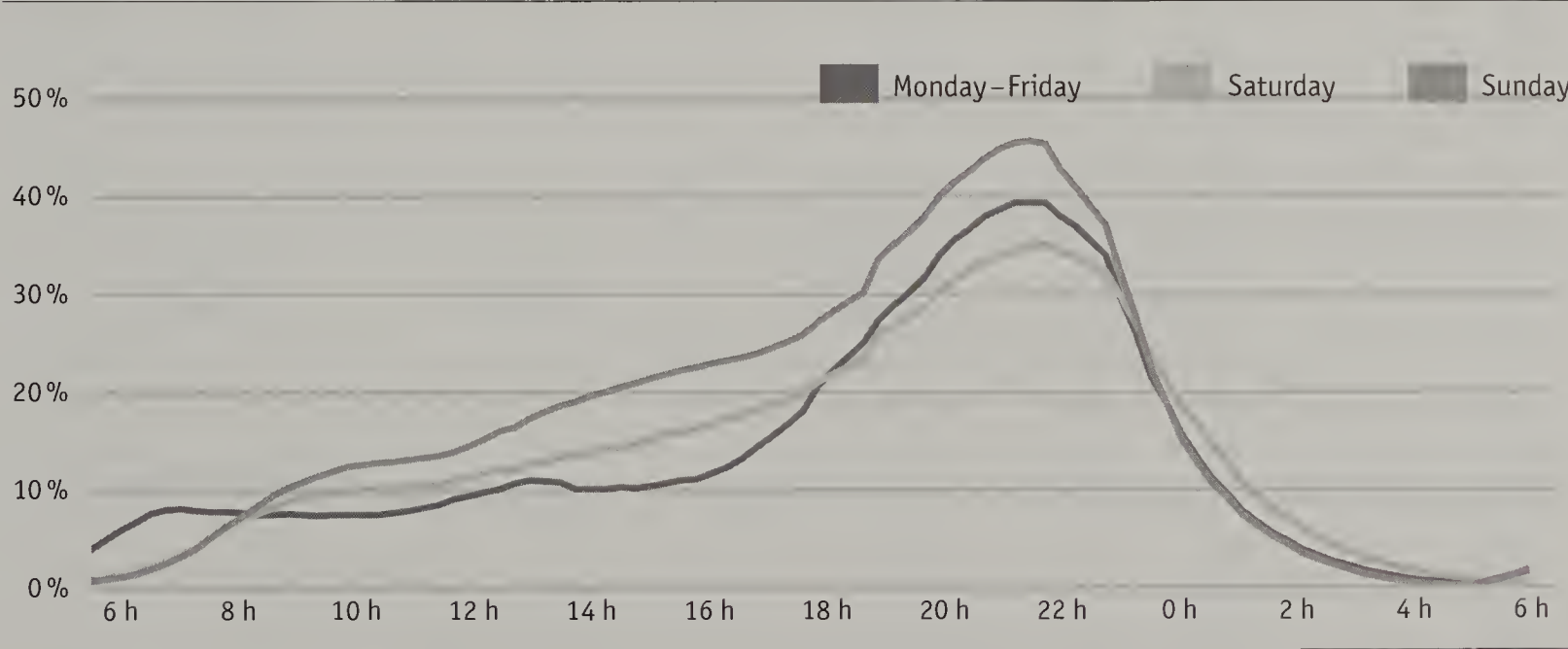
Source: Nielsen Media Research

Viewing Patterns

AUDIENCE MEASUREMENT	
Name of the Service and Institute:	Nielsen Media Research
Panel/Sampling Size	5 018 Households
Instrument used (people-meter, telefon, face-to-face)	People-meter
	Population size in 000
Individuals 2+	259 930
Adults 18+	197 670
Housewives 18+	87 480
Teens 12–17	22 450
Children 2–11	39 810

Sources: Nielsen Media Research, January 2000

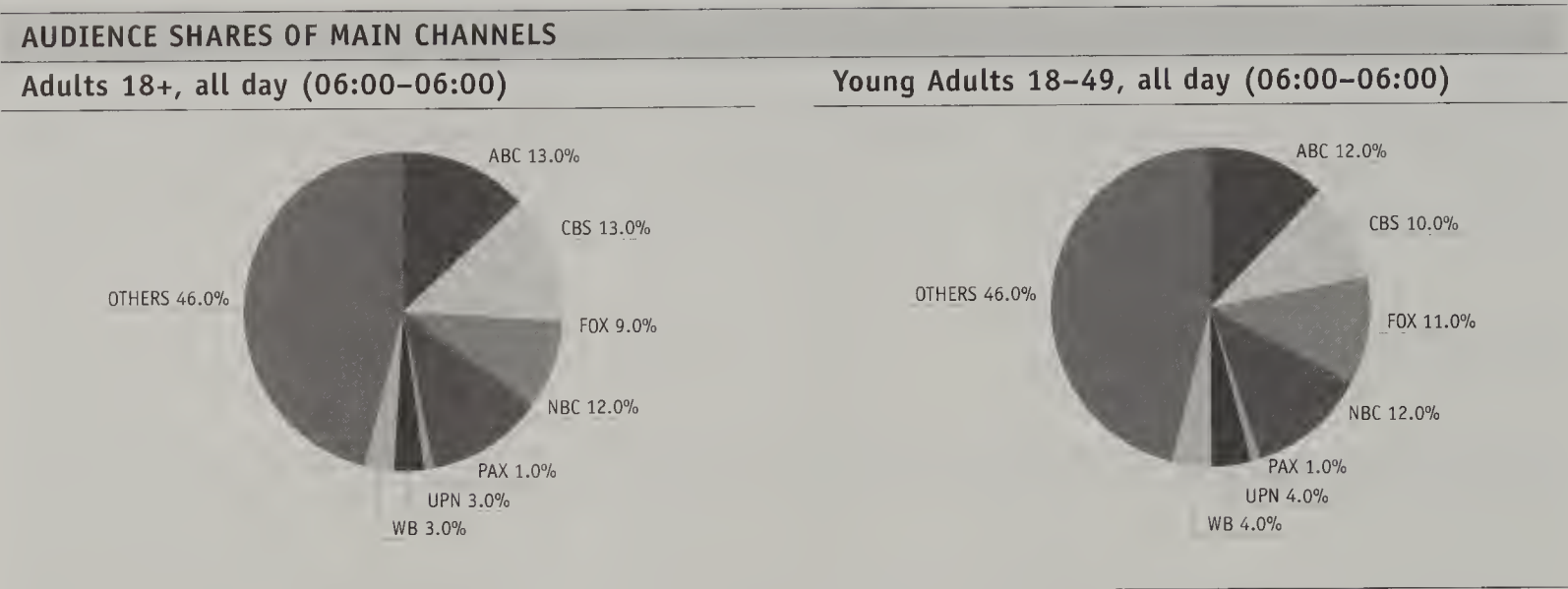
TOTAL TV RATING 1999
Adults Age: 18+



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Individuals 2+			Adults 18+			Children 2–11			Teens 12–17		
	1997	1998	1999	1997	1998	1999	1997	1998	1999	1997	1998	1999
Daily reach in %	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Viewing time per Viewer	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Viewing time per Individual	238	238	242	254	256	259	181	180	177	173	184	180

Source: Nielsen Media Research

Audience Shares



AUDIENCE SHARES OF MAIN CHANNELS / ALL DAY 06:00 – 06:00								
	Adults 18+		Young Adults 18–49		Children 2–11		Housewives 18+	
	1998/99	1999/2000	1998/99	1999/2000	1998/99	1999/2000	1998/99	1999/2000
ABC	12.0%	13.0%	12.0%	12.0%	8.0%	9.0%	13.0%	14.0%
CBS	14.0%	13.0%	10.0%	10.0%	5.0%	6.0%	16.0%	14.0%
FOX	9.0%	9.0%	12.0%	11.0%	11.0%	9.0%	8.0%	7.0%
NBC	13.0%	12.0%	13.0%	12.0%	5.0%	5.0%	14.0%	13.0%
PAX	1.0%	1.0%	1.0%	1.0%	n.a.	1.0%	1.0%	1.0%
UPN	3.0%	3.0%	3.0%	4.0%	4.0%	7.0%	3.0%	3.0%
WB	3.0%	3.0%	4.0%	4.0%	7.0%	10.0%	3.0%	3.0%
OTHERS	45.0%	46.0%	45.0%	46.0%	60.0%	53.0%	42.0%	45.0%

1998/99: 21 September 1998–26 May 1999; 1999/2000: 20 September 1999–24 May 29 2000

AUDIENCE SHARES OF MAIN CHANNELS / BY DAY PARTS								
	Adults 18+		Young Adults 18–49		Children 2–11		Housewives 18+	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	9–16 h	20–23 h	9–16 h	20–23 h	9–16 h	20–23 h	9–16 h	20–23 h
ABC	13.0%	15.0%	13.0%	15.0%	5.0%	13.0%	16.0%	16.0%
CBS	18.0%	14.0%	13.0%	10.0%	6.0%	7.0%	21.0%	16.0%
FOX	4.0%	9.0%	5.0%	12.0%	11.0%	8.0%	3.0%	8.0%
NBC	10.0%	14.0%	10.0%	14.0%	5.0%	7.0%	12.0%	15.0%
PAX	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
UPN	n.a.	3.0%	n.a.	4.0%	n.a.	6.0%	n.a.	3.0%
WB	2.0%	3.0%	3.0%	4.0%	9.0%	5.0%	1.0%	3.0%
PBS	n.a.	3.0%	n.a.	2.0%	n.a.	1.0%	n.a.	3.0%
CABLE NETWORKS	n.a.	34.0%	n.a.	33.0%	n.a.	49.0%	n.a.	31.0%
PREM. CABLE	n.a.	5.0%	n.a.	6.0%	n.a.	3.0%	n.a.	4.0%

Source: Nielsen Media Research

Top Programmes all Channels

TOP 40 PROGRAMMES (ALL CATEGORIES)							
Title	Land	Channel	Genre	Start.Time	Date	Audience	Share
SUPER BOWL XXXIV TENN.-ST. LOUIS		ABC	Sport	18:26	30/01	38.1%	66%
SUPER BOWL POST GUN	USA	ABC	Sport Show	21:58	30/01	32.0%	56%
SUPER BOWL SHOWCASE	USA	ABC	Sport Show	18:20	30/01	31.4%	64%
SUPER BOWL KICK-OFF III	USA	ABC	Sport Show	17:54	30/01	24.2%	54%
SUPER BOWL POST GAME	USA	ABC	Sport Show	22:04	30/01	22.0%	41%
ACADEMY AWARDS	USA	ABC	Variety Show	20:30	26/03	21.3%	48%
NFC CHMP TAMPA BAY-ST LOUIS		FOX	Sport	16:21	23/01	19.6%	48%
E.R.	USA	NBC	Series-Medical	22:00	17/02	18.2%	40%
AFC CHMP TENNESSEE-JACKSONVILLE		CBS	Sport	12:41	23/01	16.3%	51%
E.R.	USA	NBC	Series-Medical	22:00	18/05	16.1%	36%
WHO WANTS TO BE A MILLIONAIRE-TUE	USA	ABC	Quiz Show	20:00	18/05	15.7%	33%
FRASIER	USA	NBC	Sitcom	21:00	25/01	15.7%	33%
WHO WANTS TO BE A MILLIONAIRE-TUE	USA	ABC	Quiz Show	20:00	18/05	15.6%	38%
WHO WANTS TO BE A MILLIONAIRE-WED	USA	ABC	Quiz Show	20:00	05/02	15.5%	39%
WHO WANTS TO BE A MILLIONAIRE-MON	USA	ABC	Quiz Show	20:00	03/05	15.5%	36%
E.R.	USA	NBC	Series-Medical	22:00	01/05	15.4%	36%
SUPER BOWL KICK-OFF II		ABC	Sport	17:36	30/01	15.2%	38%
WHO WANTS TO BE A MILLIONAIRE-THU	USA	ABC	Quiz Show	21:00	04/05	15.2%	34%
SPIN CITY	USA	ABC	Sitcom	21:00	24/05	14.9%	33%
E.R.	USA	NBC	Series-Medical	22:00	30/09	14.8%	35%
E.R.	USA	NBC	Series-Medical	22:00	10/02	14.8%	34%
AFC WILDCARD PLAYOFF MIAMI-SEATTLE		CBS	Sport	16:05	09/01	14.6%	39%
E.R.	USA	NBC	Series-Medical	22:00	24/02	14.6%	33%
WHO WANTS TO BE A MILLIONAIRE-THU	USA	ABC	Quiz Show	21:00	20/01	14.5%	30%
WHO WANTS TO BE A MILLIONAIRE-WED	USA	ABC	Quiz Show	20:00	01/03	14.4%	33%
AFC DIVISIONAL PLAYOFF		CBS	Sport	16:04	16/01	14.3%	39%
WHO WANTS TO BE A MILLIONAIRE-WED	USA	ABC	Quiz Show	20:00	12/01	14.3%	33%
CBS NFL SINGLE MIAMI-DALLAS		CBS	Sport	16:15	25/11	14.1%	46%
COUNTDOWN TO OSCAR	USA	ABC	Variety Show	20:00	26/03	14.1%	33%
E.R.	USA	NBC	Series-Medical	22:00	14/10	14.1%	32%
FRIENDS	USA	NBC	Sitcom	20:00	18/05	13.9%	33%
WHO WANTS TO BE A MILLIONAIRE-TUE	USA	ABC	Quiz Show	20:00	29/02	13.9%	31%
E.R.	USA	NBC	Series-Medical	22:00	25/11	13.8%	31%
WHO WANTS TO BE A MILLIONAIRE-TUE	USA	ABC	Quiz Show	20:00	21/03	13.8%	31%
E.R.	USA	NBC	Series-Medical	22:00	21/10	13.7%	33%
WHO WANTS TO BE A MILLIONAIRE-TUE	USA	ABC	Quiz Show	20:00	08/02	13.6%	30%
E.R.	USA	NBC	Series-Medical	22:00	16/12	13.5%	33%
E.R.	USA	NBC	Series-Medical	22:00	06/01	13.5%	31%
WHO WANTS TO BE A MILLIONAIRE-TUE	USA	ABC	Quiz Show	20:00	07/03	13.5%	31%
E.R.	USA	NBC	Series-Medical	22:00	18/11	13.4%	32%

Source: Nielsen Media Research/20 September 1999-24 May 2000

TOP 10 MOVIES						
Title	Land	Channel	Start. Time	Date	Audience	Share
ONE SPECIAL NIGHT	USA	CBS	21:04	28/11	12.5%	26%
BEYOND PRAIRIE: TRUE STRY/LIW	USA	CBS	21:16	02/01	10.8%	23%
JESUS I	USA	CBS	21:00	14/05	10.5%	23%
TUESDAYS WITH MORRIE	USA	ABC	21:00	05/12	10.4%	21%
A SEASON FOR MIRACLES	USA	CBS	21:00	12/12	10.3%	22%
SARAH PLAIN/TALL: WINTER'S END	USA	CBS	21:00	21/11	9.5%	19%
SALLY HEMINGS: AMER SCNDL I	USA	CBS	21:00	13/02	9.1%	18%
PERFECT MURDER PERFECT TOWN I	USA	CBS	21:00	27/02	8.6%	18%
THE SOUL COLLECTOR	USA	CBS	21:37	24/10	8.4%	19%
MARY AND RHODA	USA	ABC	20:00	07/02	8.4%	18%

TOP 10 SPORT EVENTS						
Title		Channel	Start.Time	Date	Audience	Share
SUPER BOWL XXXIV TENNESSEE-ST. LOUIS		ABC	18:26	31/01	38.1%	66%
NFC CHMP TAMPA BAY-ST LOUIS		FOX	16:21	23/01	19.6%	48%
AFC CHMP TENNESSEE-JACKSONVILLE		CBS	12:41	23/01	16.3%	51%
AFC WILDCARD PLAYOFF MIAMI-SEATTLE		CBS	16:05	09/01	14.6%	39%
AFC DIVISIONAL PLAYOFF TENNESSEE-INDIANAPOLIS		CBS	16:04	16/01	14.3%	39%
NFL SINGLE MIAMI-DALLAS		CBS	16:15	25/11	14.1%	46%
NFC PLAYOFF MINNESATO-ST LOUIS		FOX	12:36	16/01	13.3%	45%
NFC WILDCARD GAME DALLAS-MINNESOTA		FOX	12:36	09/01	12.8%	44%
SUGAR BOWL FLORIDA-VIRGINIA		ABC	20:11	04/01	12.4%	28%
WORLD SERIES GAME ATLANTA-NEW YORK		NBC	20:16	27/10	12.0%	29%

Source: Nielsen Media Research/20 September 1999-24 May 2000

Top Programmes Channel by Channel

ABC						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
WHO WANTS TO BE A MILLION.-TUE	USA	Quiz Show	20	20:00	12.8%	30%
WHO WANTS TO BE A MILLION.-THU	USA	Quiz Show	18	21:00	12.3%	27%
WHO WANTS TO BE A MILLION.-SUN	USA	Quiz Show	16	21:00	12.2%	24%
NFL MONDAY NIGHT FOOTBALL	USA	Sport	16	21:07	8.9%	22%
THE PRACTICE	USA	Series-Crime	29	22:00	8.3%	19%
NFL MONDAY SHOWCASE	USA	Show	16	21:00	7.6%	17%
NYPD BLUE	USA	Series-Crime	20	22:00	7.4%	18%
DHARMA & GREG	USA	Sitcom	33	21:00	7.0%	16%
DREW CAREY SHOW	USA	Sitcom	35	21:00	6.2%	14%
SPIN CITY	USA	Sitcom	33	21:30	5.9%	14%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
S.BOWL XXXIV TENN.-ST. LOUIS		Sport	30/01	18:26	38.1%	66%
SUPER BOWL POST GUN	USA	Sport Show	30/01	21:58	32.0%	56%
SUPER BOWL SHOWCASE	USA	Sport Show	30/01	18:20	31.4%	64%
SUPER BOWL KICK-OFF III	USA	Sport Show	30/01	17:54	24.2%	54%
SUPER BOWL POST GAME	USA	Sport Show	30/01	22:04	22.0%	41%
ACADEMY AWARDS	USA	Variety Show	26/03	20:30	21.3%	48%
SUPER BOWL KICK-OFF II	USA	Sport Show	30/01	17:36	15.2%	38%
COUNTDOWN TO OSCAR 2000	USA	Variety Show	26/03	20:00	14.1%	33%
SUGAR BOWL		Sport	02/02	20:11	12.4%	28%
ABC 2000	USA	Quiz	31/12	23:20	11.3%	35%

Source: Nielsen Media Research/20 September 1999–24 May 2000

CBS						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
CBS NFL NATIONAL		Sport	8	Variable	8.8%	27%
60 MINUTES	USA	News	34	17:00	8.3%	20%
TOUCHED BY AN ANGEL	USA	Series-Drama	32	20:00	8.0%	17%
EVERYBODY LOVES RAYMOND	USA	Sitcom	35	21:00	8.0%	17%
CBS SUNDAY MOVIE	USA	Movie	33	21:00	7.4%	16%
BECKER	USA	Sitcom	34	21:30	7.3%	15%
CBS NFL SINGLE	USA	Sport	7	13:02	6.8%	25%
JUDGING AMY	USA	Series-Drama	31	22:00	6.8%	16%
J.A.G.	USA	Series-Action	35	20:00	6.7%	16%
60 MINUTES II	USA	News	33	21:00	6.3%	14%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
AFC CHMP		Sport	23/01	12:41	16.3%	51%
AFC WILDCARD PLAYOFF		Sport	09/01	16:05	14.6%	39%
AFC DIVISIONAL PLAYOFF		Sport	16/01	16:04	14.3%	39%
CBS NFL SINGLE-THU		Sport	25/11	16:15	14.1%	46%
AFC WILDCARD POST GAME		Sport	09/01	17:03	12.7%	30%
GRAMMY AWARDS	USA	Variety Show	23/02	20:00	11.2%	25%
CBS NCAA BSKBL CHMP		Sport	03/04	21:15	9.5%	22%
AFC DIVISIONAL PLAYOFF-SA		Sport	15/01	12:35	8.8%	37%
CMA AWARDS	USA	Variety Show	22/09	20:00	8.5%	20%
AFC CHMP POST GAME		Sport	23/01	15:43	8.2%	23%

Source: Nielsen Media Research/20 September 1999–24 May 2000

FOX						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
FOX NFL SUNDAY-NATIONAL	USA	Sport	7	Variable	9.4%	29%
FOX NFL SUNDAY-SINGLE	USA	Sport	8	13:02	7.7%	29%
FOX NFL SUNDAY-PST GN-NAT	USA	Sport	15	Variable	6.4%	19%
MALCOLM IN THE MIDDLE	USA	Sitcom	18	20:30	5.4%	11%
X-FILES	USA	Series-Mystery	31	21:00	5.4%	11%
ALLY MCBEAL	USA	Series	34	21:00	5.4%	11%
FOX NFL SUNDAY-REGIONAL	USA	Sport	7	13:02	5.0%	18%
GREED 2	USA	Quiz Show	4	21:30	5.0%	11%
SIMPSONS	USA	Sitcom	32	20:00	5.0%	11%
FOX NFL SUNDAY-POST	USA	Sport	6	Variable	4.9%	15%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
FOX NFC CHMP		Sport	23/01	16:21	19.6%	48%
FOX NFC CHMP		Sport	23/01	16:16	15.1%	42%
FOX NFC PLAYOFF		Sport	16/01	12:36	13.3%	45%
FOX NFC WILDCARD GAME		Sport	09/01	12:36	12.8%	44%
FOX NFC PLAYOFF-SAT		Sport	15/01	16:16	11.0%	36%
FOX NFC CHMP		Sport	23/01	19:34	10.0%	22%
FOX NFL-THU		Sport	25/11	12:32	9.9%	35%
FOX NFC PLAYOFF-SA PST GN	USA	Sports Show	15/01	19:19	8.8%	25%
FOX NFC WILDCARD POST GME	USA	Sports Show	09/01	15:43	8.7%	27%
FOX NFC CHMP	USA	Sports Show	23/01	15:30	8.1%	23%

Source: Nielsen Media Research/20 September 1999-24 May 2000

NBC						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
E.R.	USA	Series-Medical	32	22:00	11.6%	28%
FRIENDS	USA	Sitcom	35	20:00	9.4%	23%
FRASIER	USA	Sitcom	34	21:00	9.2%	21%
LAW AND ORDER	USA	Series-Crime	35	22:00	7.8%	19%
JESSE	USA	Sitcom	20	20:30	7.5%	17%
STARK RAVING MAD	USA	Sitcom	21	21:30	7.1%	16%
DADDIO	USA	Sitcom	5	20:30	7.0%	17%
PROVIDENCE	USA	Series-Drama	31	20:00	6.2%	17%
WEST WING	USA	Series-Crime	31	21:00	6.2%	14%
DATELINE FRI	USA	News Magazine	25	21:00	5.8%	15%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
NBC WORLD SERIES GAME 4		Sport	27/10	20:16	12.0%	29%
NBC WORLD SERIES GAME 3		Sport	26/10	20:16	11.3%	27%
NBC WORLD SERIES GAME 2		Sport	24/10	20:11	10.5%	23%
GOLDEN GLOBE AWARDS	USA	Variety Show	23/01	20:00	10.3%	20%
NBC LEAGUE CHAMP SERIES 6		Sport	19/10	20:08	10.2%	26%
SNL 25TH ANNIVERSARY SPCL	USA	Variety Show	26/09	21:00	10.1%	23%
NBC WORLD SERIES GAME 1		Sport	23/10	20:03	10.0%	26%
FRIENDS-SL	USA	Sitcom	11/05	20:30	9.2%	23%
MACYS THANKSGIVING PARADE	USA	Variety Show	25/11	21:00	8.5%	18%
NBC LEAGUE CHMP		Sport	17/10	16:11	8.0%	21%

Source: Nielsen Media Research/20 September 1999-24 May 2000

PAX						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
DIAGNOSIS MURDER-MON	USA	Series–Crime	35	22:00	0.8%	2%
DIAGNOSIS MURDER-THU	USA	Series–Crime	34	22:00	0.7%	2%
DIAGNOSIS MURDER-TUE	USA	Series–Crime	36	22:00	0.7%	2%
TOUCHED BY AN ANGEL-TUE	USA	Series–Drama	36	21:00	0.7%	1%
DIAGNOSIS MURDER-WED	USA	Series–Crime	36	22:00	0.6%	2%
DIAGNOSIS MURDER-FRI	USA	Series–Crime	32	22:00	0.6%	1%
TOUCHED BY AN ANGEL-FRI	USA	Series–Drama	32	21:00	0.6%	1%
TOUCHED BY AN ANGEL-MON	USA	Series–Drama	34	21:00	0.6%	1%
TOUCHED BY AN ANGEL-THU	USA	Series–Drama	34	21:00	0.6%	1%
TOUCHED BY AN ANGEL-WED	USA	Series–Drama	36	21:00	0.6%	1%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
MRS. AMERICA PAGEANT	USA	Variety Show	25/09	21:00	0.7%	2%
DIAGNOSIS MURDER -SPECIAL	USA	Movie	26/11	22:00	0.7%	2%
SOLOMON I	USA	Movie	30/04	21:00	0.7%	1%
BONANZA-SPECIAL	USA	Series	11/03	17:00	0.6%	2%
BONANZA-SPECIAL	USA	Series	11/03	18:00	0.6%	2%
BONANZA-SPECIAL	USA	Series	11/03	19:00	0.6%	2%
JESUS SPECIAL	USA	Movie	24/12	22:00	0.6%	2%
BONANZA SPECIAL	USA	Series	11/03	20:00	0.5%	2%
SOLOMON II	USA	Movie	01/05	21:00	0.6%	1%
TOUCHED BY AN ANGEL–SPECIAL	USA	Series	07/02	19:00	0.5%	1%

Source: Nielsen Media Research/20 September 1999–24 May 2000

UPN						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
STAR TREK: VOYAGER	USA	Series–SF	35	21:00	2.2%	5%
WWF SMACKDOWN!	USA	Sport	35	20:00	2.2%	5%
7 DAYS	USA	Series–SF	31	20:00	1.3%	3%
PARKERS	USA	Series–SF	36	20:30	1.2%	3%
MOESHA	USA	Sitcom	36	20:00	1.1%	3%
GROWN UPS	USA	Sitcom	35	21:00	1.1%	2%
BLOCKBUSTER CINEMA	USA	Movie	28	20:00	1.0%	3%
MALCOLM & EDDIE	USA	Sitcom	35	21:30	1.0%	2%
MOESHA TUESDAY	USA	Sitcom	7	20:30	0.9%	2%
PARKERS, THE TUESDAY	USA	Series	7	20:00	0.9%	2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
KILLERS IN THE WATER	USA	Movie	28/12	20:00	1.8%	4%
STAR TREK’S GREAT MOMENTS	USA	Series–SF	01/12	20:00	1.7%	4%
STAR TREK: VOYAGER SPECIAL	USA	Series–SF	22/09	20:00	1.7%	4%
UPN SPECIAL FEATURE	USA	Movie	29/12	20:00	1.7%	4%
DANGER IN OUR SKIES	USA	Reality	28/12	21:00	1.6%	4%
SHASTA MCNASTY SPECIAL	USA	Sitcom	30/09	21:30	1.4%	3%
WWF’S GREATEST HITS	USA	Sport	30/11	20:00	1.4%	3%
MALCOLM & EDDIE	USA	Sitcom	10/01	21:00	1.2%	2%
STAR TREK: VOYAGER SPECIAL	USA	Series–SF	12/04	20:00	1.1%	3%
TOTALLY RIDICULOUS!	USA	Reality Show	21/12	21:00	1.1%	3%

Source: Nielsen Media Research/20 September 1999–24 May 2000

WB						
Top 10 Recurrent Programmes	Land	Genre	Runs	Start.Time	Audience	Share
7TH HEAVEN	USA	Series-Drama	36	20:00	2.2%	5%
CHARMED	USA	Series-Mystery	33	21:00	1.7%	4%
ANGEL	USA	Series-Mystery	34	21:00	1.6%	4%
BUFFY, THE SLAYER	USA	Series-Mystery	36	20:00	1.6%	4%
SAFE HARBOR	USA	Series-Drama	8	21:00	1.4%	3%
7TH HEAVEN-9PM	USA	Series-Drama	5	21:00	1.2%	3%
ROSWELL	USA	Series	30	21:00	1.2%	3%
DAWSON'S CREEK	USA	Series-Drama	35	20:00	1.2%	3%
STEVE HARVEY SHOW	USA	Show	31	21:00	1.1%	3%
FELICITY	USA	Series-Drama	32	20:00	1.1%	2%

Top 10 Single Programmes	Land	Genre	Date	Start.Time	Audience	Share
BUFFY SPECIAL	USA	Series-Drama	28/09	21:00	1.6%	4%
POPULAR	USA	Series-Drama	29/09	21:00	1.5%	3%
JAMIE FOXX-XMASEVE	USA	Variety Show	24/12	20:30	1.2%	4%
FOR YOUR LOVE	USA	Sitcom	07/01	20:30	1.2%	3%
STEVE HARVEY-XMASEVE1	USA	Sitcom	24/12	21:00	1.1%	4%
STEVE HARVEY-XMASEVE2	USA	Show	24/12	21:30	1.1%	4%
CHARMED SPECIAL	USA	Mystery	23/09	20:00	1.1%	3%
STEVE HARVEY-NYEVE2	USA	Sitcom	31/12	21:30	1.1%	3%
JAMIE FOXX-XMASEVE1	USA	Variety Show	24/12	20:00	1.0%	4%
ANGEL-ENCORE-WB	USA	Series-Drama	10/10	18:00	1.0%	3%

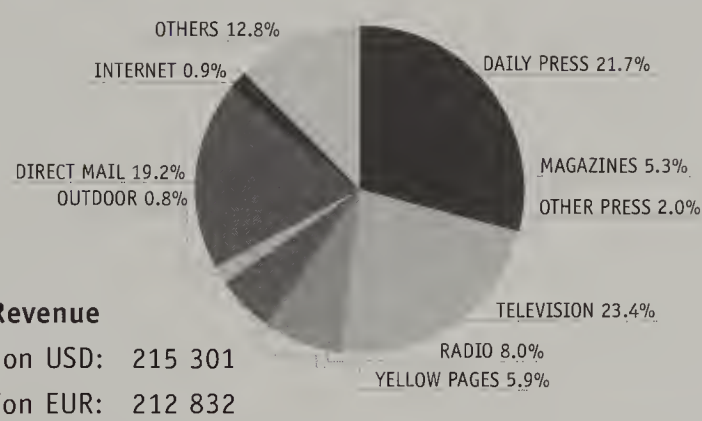
Source: Nielsen Media Research/20 September 1999-24 May 2000

Advertising Expenditure

ADVERTISING FIGURES		GROSS
Total adspend	(in million USD)	215 301
Total adspend	(in million EUR)	212 832
TV adspend	(in million USD)	50 440
TV adspend	(in million EUR)	49 862
TV adspend	in % of GDP	0.56
TV adspend	per capita (USD)	183

Source: Universal McCann

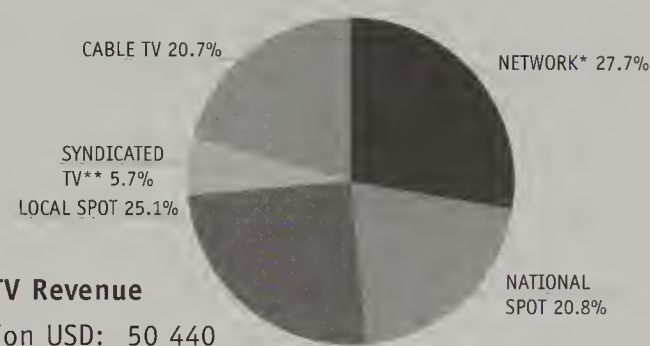
SHARE OF MEDIA EXPENDITURE	GROSS
Category: Market Share in %	



Total Revenue
in million USD: 215 301
in million EUR: 212 832

Sources: Universal McCann

SHARE OF TV ADVERTISING REVENUE	GROSS
Channels: Advertising Market Share in %	



Total TV Revenue
in million USD: 50 440
in million EUR: 49 862

*includes FOX; **PAX, UPN and WB currently in Syndication

TOP 10 ADVERTISING FIGURES	
National Spot TV Adverting Sectors	1999 in 000 USD
AUTOMOTIVE	3 456 037
RESTAURANTS	1 364 384
FOOD & FOOD PRODUCTS	845 220
TELECOMMUNICATIONS	667 525
FINANCIAL	463 370
TRAVEL, HOTELS & RESORTS	441 826
INSURANCE & REAL ESTATE	412 938
MOTION PICTURES	386 385
MEDIA & ADVERTISING	341 975
GOVERNMENT & ORGANIZATIONS	292 195

TOP 10 ADVERTISING FIGURES	
TV Spot Advertisers	1999 in 000 USD
DAIMLER CHRYSLER AG	665 201
GENERAL MOTORS CORP.	506 593
FORD MOTOR CORP. DLR. ASSN	344 686
HONDA MOTOR CO.	257 912
FORD MOTOR CO.	227 645
GENERAL MILLS INC.	206 765
PHILIP MORRIS COS. INC.	201 538
TOYOTA MOTOR CORP.	200 785
GENERAL MOTORS CORP. DLR. ASSN.	196 700
TRICON GLOBAL RESTAURANTS	191 621

Source: Television Bureau of Advertising (TVB)

TOP 10 ADVERTISING FIGURES	
Local Spot TV Advertising Sectors	1999 in 000 USD
CAR & TRUCK DEALERS	534 662
FURNITURE STORES	511 408
LEISURE TIME ACTIVITIES & EVENTS	325 473
FOOD, STORES/SUPERMARKETS	321 613
HOME ELECTRONICS & VIDEO STORES	302 556
DEPARTMENT STORES	272 754
DISCOUNT DEPARTMENT STORES	238 083
MEDICAL & DENTAL SERVICES	220 075
HOME CENTERS & HARDWARE STORES	203 967
CLOTHING STORES	202 930

Methodology

Definitions and Abbreviations

The information presented in this publication is mainly based on the data supplied by each individual country. Some of them are provided by local institutes while others are taken from Eurodata TV databank developed by Mediametrie International. We are therefore not dea-

ling with Pan-European study based on a single methodology. We didn't try to harmonise the information given in the book, therefore, when comparing data, the reader should be very careful. All figures are related to 1999, unless otherwise stated.

EXCHANGE RATES				
Country	Currency	Abbreviation	1 EUR	1 USD
Austria	Austrian Shilling	ATS	13.76	13.65
Belarus*	Belarus Rouble	BYR	255 935.00	253 000.00
Belgium	Belgian Franc	BEF	40.34	40.16
Brazil*	Brasillian Real	BRL	1.87	1.85
Bulgaria	Bulgarian Lev	BGL	1.79	1.77
Croatia	Croatian Kuna	HRK	7.63	7.12
Czech Rep.	Czech Koruna	CZK	36.10	35.94
Denmark	Danish Krone	DKK	7.44	7.41
Estonia	Estonian Kroon	EEK	15.65	14.68
Finland	Finnish Markka	FIM	5.95	5.91
France	French Franc	FRF	6.56	6.53
Germany	German Mark	DEM	1.96	1.94
Greece	Greek Drachma	GRD	330.3	328.8
Hungary*	Hungarian Forint	HUF	257.00	266.00
Iceland	Iceland Krona	ISK	72.84	72.55
Ireland	Irish Punt	IEP	0.79	0.78
Israel	Israel New Shekel	ILS	4.16	4.12
Italy	Italian Lira	ITL	1 936.27	1 914.07
Japan	Japanese Yen	JPY	102.73	102.26
Latvia	Latvian Lat	LVR	0.59	0.58
Lithuania**	Lithuanian Lit	LTT	3.89	4.00
Luxembourg	Luxembourg Franc	LUF	40.34	40.16
Macedonia	Macedonian Denar	MKD	60.66	60.34
Mexico	Mexican Peso	MXN	9.51	9.47
Netherlands	Dutch Guilder	NLG	2.20	2.19
Norway	Norwegian Krone	NOK	8.06	7.99
Poland	Polish Zloty	PLN	4.23	3.97
Portugal	Portuguese Escudo	PTE	200.48	198.00
Romania	Romanian Leu	ROL	16.284	15.321
Russia	Russian Ruble	RUR	24.82	24.53
Slovakia	Slovakia Koruna	SKK	42.42	42.23
Slovenia	Slovenian Tolar	SIT	197.4	181.80
Spain	Spanish Peseta	ESP	166.39	165.62
South Africa	South African Rand	ZAR	6.18	6.16
Sweden	Swedish Krona	SEK	8.56	8.52
Switzerland	Swiss Franc	CHF	1.61	1.59
Turkey	Turkish Lira	TRL	544 373.00	541 880.00
Ukraine*	Ukraine Hryvna	UAH	5.08	4.13
United Kingd.	British Pound	GBP	0.62	0.62
United States	United States Dollar	USD	1.005	1.00

Date: December 99; *Average Rate; **March 2000

DEFINITIONS AND ABBREVIATIONS	
General Data	
CH – F	French speaking Switzerland
CH – G	German speaking Switzerland
CH – I	Italian speaking Switzerland
DTH	Direct to home/private dish
DS	Digital satellite
DT	Digital terrestrial
GDP	Gross Domestic Product
MMDS	Multipoint Microwave Distribution System, Terrestrial Microwave
n.a.	not available
SMATV	Collective Satellite Dish
VCR	Video Cassette Recorder
TV Landscape	
Adv.	Advertising
C	Cable
Gvt	Government – support
L–F	Licence Fee and other State supports
Pay	Subscription Fee for premium encrypted channels
S	Satellite
Spon.	Sponsorship
Sub.	Subscription Fee
sub.	subtitled
T	Terrestrial
Audience Shares	
h	Hour
Top Programmes	
BASEB	Baseball
BBAL	Basketball
CHMP	Championship
CL	Champions League
Docum.	Documentary
Entertain.	Entertainment
EU – Leag.	Euro League
EU CHMP	European Championship
FBAL	Football/Soccer
HBAL	Handball
ICEHOCK	Icehockey
Length m.	Length minutes
(M.)	Men
Recurrent Programmes	Programme – Run 4 times and more
SF	Science Fiction
Single Programmes	Programme – Run 3 times and less
Ski	Skiing
Start.Time	Starting Time
VBAL	Volleyball
(W.)	Women
W. CHMP	World Championship
W. CUP	World Cup
Advertising Expenditure	
in sec.	in seconds

IP and IP Network Sales Organization

IP and IP Network

IP

For more than 70 years IP has been the partner of the advertising world. Present in the centres of the advertising world IP is proud to launch its seventh edition of the Television Key Facts. IP's ambition being to share its impressive collection of data and its views on present media trends.

Whether IP handles channels that are general entertainment or thematic, private or public, free-to-air or encrypted, national or regional, its key success is its wide-ranging commercial expertise and know-how.

On the verge of an audio-visual explosion, IP is the dynamic vector and centralising force capable of providing its advertisers with effective communication tools and solutions, adapted to the real needs of a demanding era.

IP is the brand name of CLT-UFA sales houses across Europe, closely connected to the RTL brands in Radio and Television. The IP International Marketing Committee (CMI) is responsible to further the expertise on the media market and to provide clients and customers with a consult overview in the Status Report, Television Key Facts and the Radio Key Facts.

IP Network

IP Network is Europe's leading international media sales company. Wholly owned by RTL Group, it was originally formed in 1991 to represent its parent company's media properties outside their domestic market. IP Network has since broadened its activity to other media owners and now represents internationally 33 major European TV stations, over 30 radio networks as well as over 30 press titles across 16 European countries. IP Network offers the N°1 TV portfolio to international advertisers.

IP Network is headquartered in Paris. Through its network of local offices and agents in Europe, the USA and the Asian-Pacific region, IP Network deals with clients around the world when they want to start or expand their business in Europe. Each year more than 200 advertisers turn to IP Network to ease their path into foreign advertising markets.

IP Network gives agencies and advertisers unparalleled access to media and markets outside their national borders. The IP Network sales teams are their close partner with information on rate cards and availability, through to help with booking, media-planning, invoicing and billing; and they are always aware of latest commercial opportunities and special offers. IP Network produces a range of exclusive tools, including country overviews, sector surveys and target analysis.

E-mail contact: infos@email.ip-network.com

TV Portfolio

AUSTRIA

IPA-Plus	RTL, RTL II (Austria Window)	C.-Henriette Ruby	Managing Director	+43-13-67-804000
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BELGIUM

IP Belgium	RTL-TVI	Pol Heyse	Chief Executive Officer	+32-2-6795350
	Club RTL	Freddy Tacheny	IP TV Director	+32-2-6795250

FRANCE

IP France	La Cinquième/ Arte, Pathè Sport MTV France, Cineinfo.fr AFB Infos, Motors TV	Pierre Conte Christophe Loisel	Managing Director Director TV/Vice Managing	+33-1-56694010 +33-1-56694180
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M6	M6 Publicité	Catherine Lenoble	Managing & Sales Director	+33-1-41-926010
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GERMANY

IP Deutschland	RTL TELEVISION, Super RTL, RTL II, VOX	Dr. Walter Neuhauser Martin Krapf	Managing Director Sales Director	+49-221-5886-101 +49-221-5886-201
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HUNGARY

RTL Klub	RTL Klub	Steve Varcoe	Sales Director	+36-1-3828-501
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LUXEMBOURG

IP Luxembourg	RTL Tele Letzebuerg	Lou Scheider Luc Vermeiren	Managing Director Marketing Manager	+35-2-4470701 +35-2-4470701
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NETHERLANDS

IPN	RTL 4, RTL 5, Veronica	Dick van der Graaf Ton Rozestraten	Managing Director Commercial Director	+31-20-6563838 +31-20-6563838
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POLAND

IP Poland	RTL 7	Pawel Przygodzki	Deputy Managing Director & Sales Manager	+48-22-8744270
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SWITZERLAND

IP Multimedia	RTL, RTL II (advertising window), Kabel 1, Pro 7	Klaus Kapeller	Managing Director	+41-12697171
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UNITED KINGDOM

Channel 5	Channel 5	Nick Milligan	Sales Director	+44-171-550-5555
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INTERNATIONAL

IP Network		James Bull Marc Schorestene	Managing Director Sales Director	+33-1-56-884120 +33-1-56-884100
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IP Network's International Media Representations

AUSTRIA	2 national channels:	RTL (Austrian window), RTL II (Austrian window)
BELARUS	1 national channel:	BELARUS TV 1
BELGIUM	WALLONIA: 2 national channels:	RTL, TVI, CLUB RTL
	FLANDERS: 2 national channels:	VTM, KANAAL 2
CZECH REPUBLIC	2 national channels:	CT 1, CT 2
FRANCE	1 national channel:	LA CINQUIEME
GERMANY	4 national channels:	RTL TELEVISION, RTL II, SUPER RTL, VOX, ATV
	2 Turkish channels:	TRT INTERNATIONAL, KANAL D
GREECE	1 national channel:	MEGA CHANNEL
HUNGARY	1 national channel:	RTL KLUB
LUXEMBOURG	1 national channel:	RTL TELE LETZEBUERG
NETHERLANDS	3 national channels:	RTL 4, RTL 5, VERONICA
POLAND	2 national channels:	POLSAT, RTL7
PORTUGAL	1 national channel:	SIC
SLOVAK REPUBLIC	2 national channels:	STV 1, STV 2
SLOVENIA	2 national channels:	SLO 1, SLO 2
SWITZERLAND	2 regional channels:	RTL (Swiss window), RTL II (Swiss window)
UNITED KINGDOM	1 national channel:	CHANNEL 5



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Henley-on-Thames (NTC Publications).

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